

Maximizing California Consumer Commitment To Beverage Container Recycling

Prepared for:

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LIEBERMAN RESEARCH WORLDWIDE

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Background And Objectives

The purpose of this research is to determine current consumer awareness and understanding of the California Beverage Container Recycling Program and compare the findings to past performance measured by previous waves of research conducted by LRW.

RESEARCH OBJECTIVES

Measure awareness of key recycling messages and information sources

Measure awareness of specific recycling methods and CRV program details

Measure the impact recycling advertising has on recycling behavior

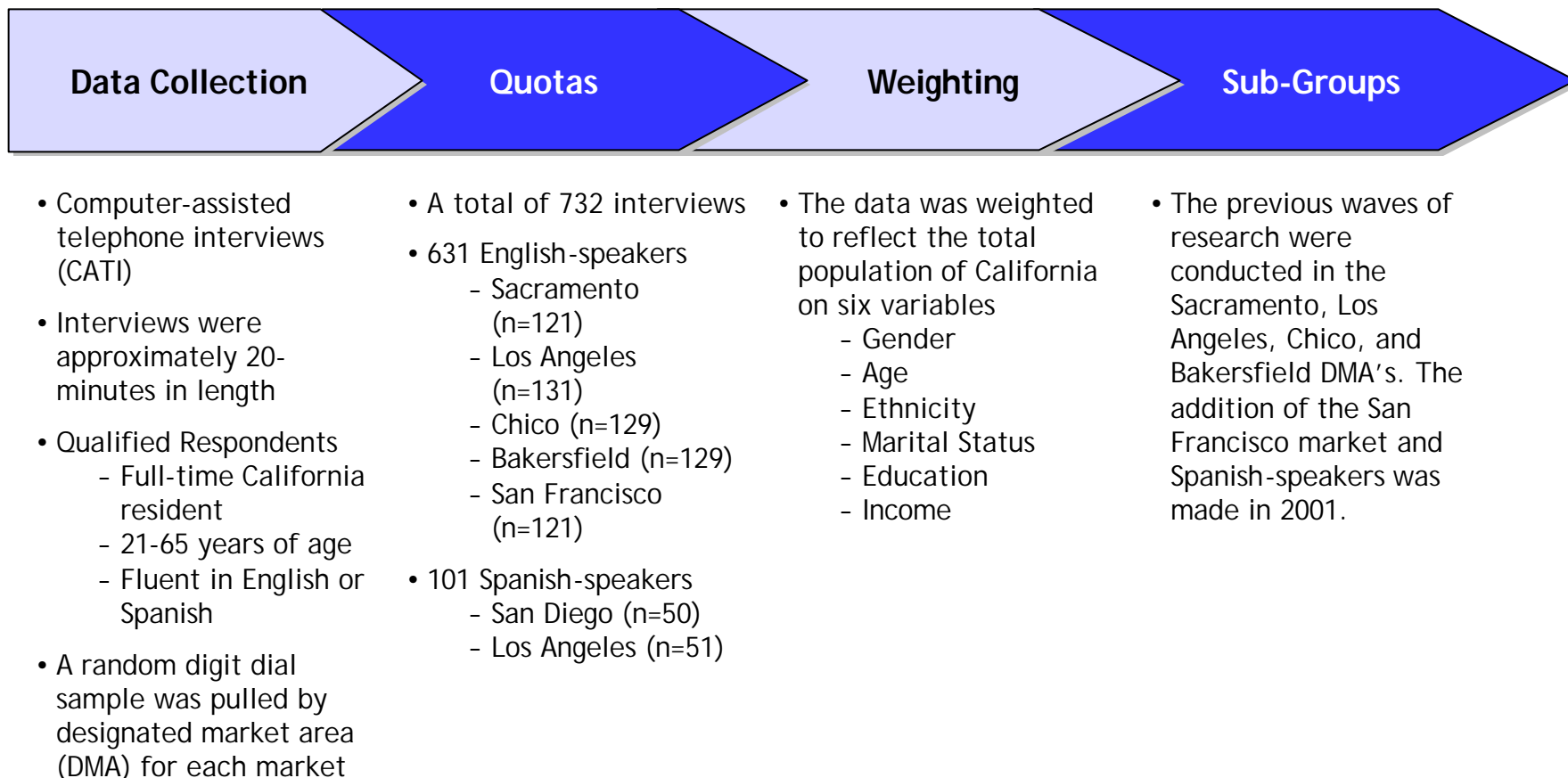
Understand key drivers and influences on recycling behavior

OVERALL OBJECTIVE

Measure The Impact
Of The
California Beverage
Container Recycling
Program And Gain
Insights To
Enhance
Its Effectiveness

Method

A total of 732 CATI (Computer-Assisted Telephone Interviews) were conducted from November 21, 2005-December 7, 2005.



Sample Demographics

The sample was drawn by DMA for each market and then weighted to match the 2003 census data for California. The data was weighted on these variables; gender, age, ethnicity, marital status, education, and income.

DEMOGRAPHICS

Trended

| | 2001 Total (N=700) | 2005 Total (N=732) |
|---------------------------------------|--------------------------|--------------------------|
| <u>Gender</u> | | |
| Male | 50% | 50% |
| Female | 50 | 50 |
| <u>Age</u> | | |
| 21-34 | 31% | 29% |
| 35-44 | 24 | 22 |
| 45-65 | 45 | 49 |
| Mean Age | 43 | 44 |
| <u>Ethnicity</u> | | |
| Caucasian | 50% | 46% |
| Hispanic | 32 | 35 |
| Other | 17 | 19 |
| <u>Marital Status</u> | | |
| Married | 54% | 50% |
| Not-Married | 46 | 50 |
| <u>Household Size</u> | | |
| Mean number of people | 3 | 3 |
| <u>Residency in California</u> | 12 yrs | 11 yrs |

| | 2001 Total (N=700) | 2005 Total (N=732) |
|---|--------------------------|--------------------------|
| <u>Length at Current Address</u> | 6 yrs | 6 yrs |
| <u>Ownership of Dwelling</u> | | |
| Own | 58% | 60% |
| Rent | 42 | 40 |
| <u>Type of Dwelling</u> | | |
| Home/duplex/townhouse | 79% | 84% |
| Apartment/other | 21 | 16 |
| <u>Education</u> | | |
| High school or less | 43% | 41% |
| Some college or more | 57 | 59 |
| <u>Employment</u> | | |
| Employed | 64% | 66% |
| Not Employed | 36 | 34 |
| <u>Income</u> | | |
| Less than \$40,000 | 43% | 42% |
| \$40,000 or more | 57 | 58 |
| Average Household Income | \$46,000 | \$49,973 |

Key Findings

The 2005 recycling advertising campaign has been successful in increasing overall awareness of the social responsibility of beverage container recycling consistent with the underlying values of California Residents with two-thirds motivated by these types of messages. Opportunities to further build recycling behavior -- the amount and frequency of recycling -- may be encouraged by re-educating Californians on the direct benefits to them specifically focused on the CRV including types of containers and dollar amount.

- Beverage container recycling ad awareness continues to maintain high awareness levels as seen in previous years, however, the specific ad executions from 2005 are not as memorable to residents as the 2001 ads.
 - Over half of California residents remember seeing or hearing advertising for beverage container recycling in the past year.
 - The messages most often recalled center around social responsibility including saving the environment.
 - Although advertising awareness remains high, the recall of the three specific executions for 2005 is low. Of the three ads the Rock Band ad is the one that residents recall most often, although at levels lower than expected.
 - Hispanic residents have the lowest level of advertising awareness across all ethnic groups.
 - African Americans have had a significant increase in their awareness of beverage container recycling advertising.
 - Chico and San Francisco are the two markets with the biggest drops in advertising awareness.
 - Bakersfield has the most significant improvements in advertising retentions across the five markets.

Key Findings - Continued

- Recycling has become a way of life for California residents with more than three-quarters of residents currently recycling. Residents feel it is their responsibility to recycle and the advertising campaign has continued to reinforce this way of thinking.
 - Ease of use and convenience continue to be two of the most important drivers for method selection.
 - The most used methods for recycling include curbside as well as staffed parking lots.
 - Spanish speaking residents perceive a lack of recycling method options available to them.
 - More San Francisco residents are recycling now than in 2001.
 - Chico residents have slightly decreased their recycling, which may be a reflection of the reduced advertising in this area.
- The two most recycling receptive segments, Socially Responsible and Redemption Valuers, make up approximately 64% of the California market. Both of these segments are motivated by personal responsibility messages.
 - The Redemption Valuers segment appears to be growing in size reinforcing the need to expand the amount of information available on the CRV program.
- Recycling is expected to continue into the future, however the Spanish speaking market is a vulnerable group right now and needs more information to increase their understanding of the recycling program overall.

Recommendations

Re-education Advertising Campaign

- Provide “refresher” materials or information to California residents that inform them of the specifics of recycling, while at the same time pointing out the ease in adopting recycling into all the different types of lifestyles:
 - Types of containers to recycle
 - CRV program
 - Methods available
 - Ease of execution

Hispanic Market

- Focus on the Hispanic speaking residents through dissemination of in-language materials:
 - Types of containers to recycle
 - CRV program
 - Methods available

Maintain Socially Responsible Messages

- Continue to focus on the Socially Responsible message, but also include informational ads focused on convenience, ease of use and monetary benefit (CRV).

Chapter 1: Advertising Awareness And Impact

California Residents Recall Socially Responsible Messages

Awareness of recycling advertising remains at strong levels with over one-half of California residents recalling seeing or hearing one or more ads in the past year. The messages that consumers take away from the advertising have a strong focus on being socially responsible - clean up the environment and recycling is the right thing to do.

ADVERTISING AWARENESS AND MESSAGE RECALL

Base: Among Total California Residents

Trended

Pre-Wave

55% Aware Of Advertising

| | Total (N=225) |
|---|------------------|
| Environmental (Net) | 61% |
| Protect environment | 13 |
| Keep environment clean | 11 |
| Don't pollute the environment | 10 |
| Recycling is good for environment | 8 |
| Conserve | 7 |
| Landfills are filling | 5 |
| Recycling cleans up the environment | 4 |
| Recycling (Net) | 45 |
| Everyone should recycle | 21 |
| Recycling cleans up the environment | 4 |
| Show how to recycle | 3 |
| Reduce, reuse and recycle | 3 |
| Cash back rewards (Net) | 8 |
| Can get money back | 4 |
| Told the amount of money back for recycling | 3 |

Post-Wave 1

55% Aware Of Advertising

| | Total (N=166) |
|--------------------------------|------------------|
| Keep environment clean | 38% |
| Encourage people to recycle | 34 |
| Keep landfills from filling up | 19 |
| Recycle for cash | 14 |
| Recycle to reuse materials | 14 |
| Cut down on natural resources | 2 |
| Use their recycling center | 2 |
| Referred to emblem | 1 |

Post-Wave 2

64% Aware Of Advertising

| | Total (N=461) |
|---------------------------------|------------------|
| Environmental (Net) | 44% |
| Clean up the environment | 11 |
| Helps environment | 11 |
| Prevent pollution | 7 |
| Save the environment | 5 |
| Keep community clean | 4 |
| Save the planet | 3 |
| Keep planet clean | 3 |
| Recycle (Net) | 28 |
| Container (Net) | 9 |
| Containers can be recycled | 4 |
| Responsibility (Net) | 7 |
| Personal Advantage (Net) | 5 |
| Can make money | 2 |

Post-Wave 3

58% Aware Of Advertising

| | Total (N=440) |
|---------------------------------|------------------|
| Environmental (Net) | 50% |
| Clean up the environment | 22 |
| Helps environment | 8 |
| Save resources | 8 |
| Save the environment | 12 |
| Keep community clean | 5 |
| Keep planet clean | 10 |
| Recycle (Net) | 9 |
| Container (Net) | 4 |
| Responsibility (Net) | 19 |
| It is a good thing to do | 11 |
| We all win by recycling | 7 |
| Personal Advantage (Net) | 5 |
| Can make money | 3 |

Q12: In the past year, have you seen or heard any advertising about recycling beverage bottles or cans?

Q13: What was the main message the advertising was trying to communicate?

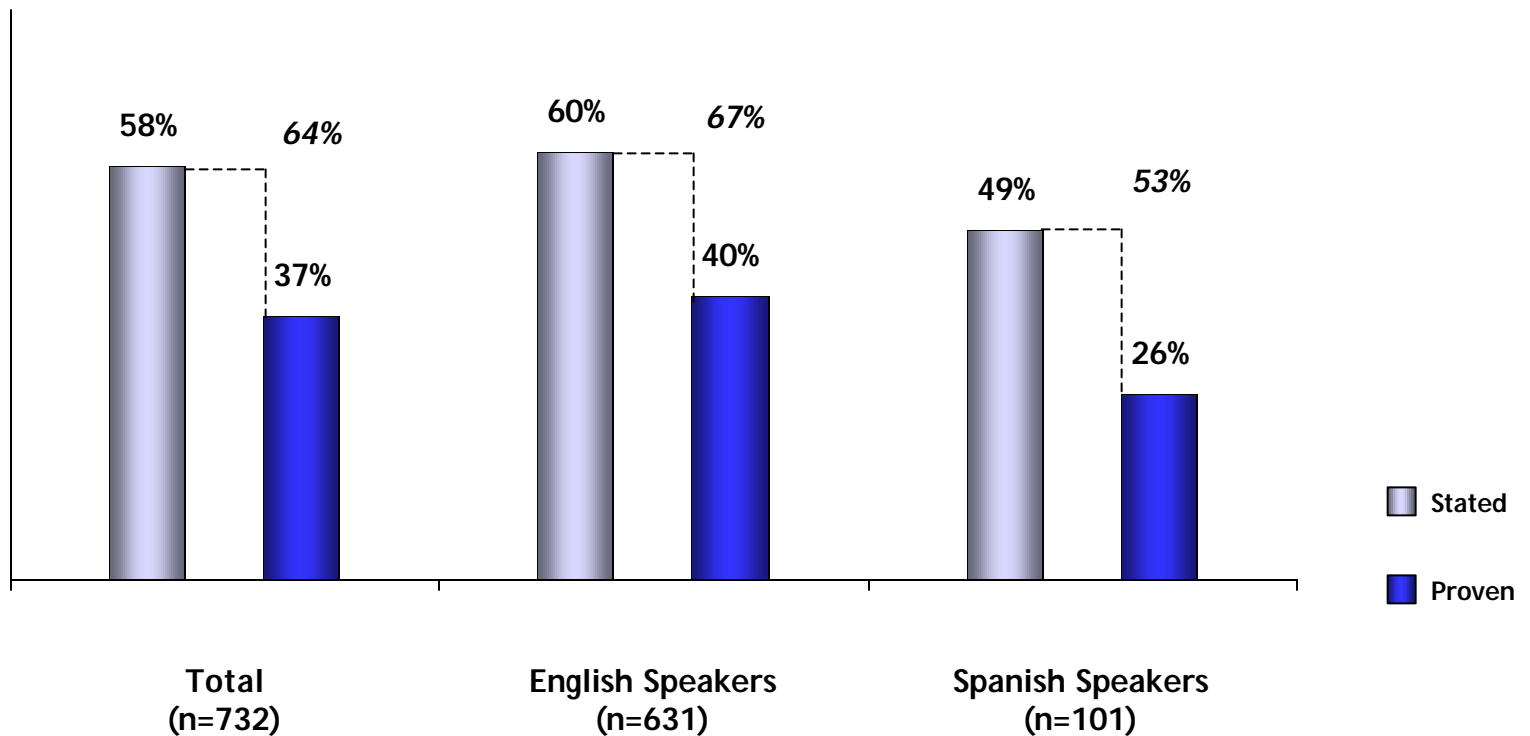
Nearly Two-Thirds Of California Residents Accurately Recall The Main Message Of The Advertising

Not only does advertising recall continue to remain at strong levels in California, California residents are recalling the main message of the ads. The beverage recycling advertising does not resonate as strongly among the Hispanic (Spanish speaking) population as it does the English speaking population.

STATED VERSUS PROVEN ADVERTISING RECALL

Base: Among Total California Residents

2005



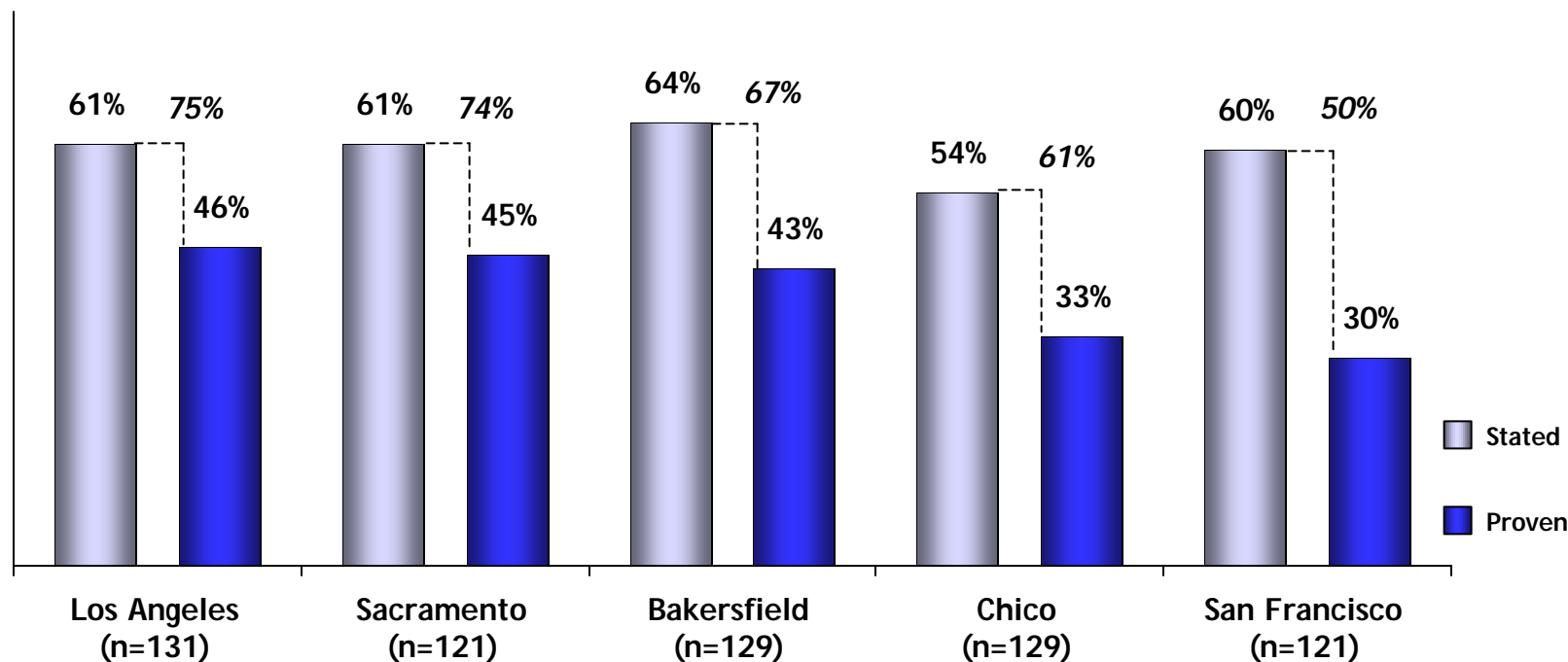
The Beverage Recycling Advertising Has Stronger Appeal To Los Angeles And Sacramento Residents

Residents of Los Angeles, Sacramento and Bakersfield have the strongest recall of the advertising for beverage recycling. Chico, where direct advertising was not a focus, has the lowest advertising recall across all 5 markets. Although San Francisco recalls seeing advertising in the past year only a small percentage accurately recall the core message.

STATED VERSUS PROVEN ADVERTISING RECALL

Base: Among Total California Residents

2005



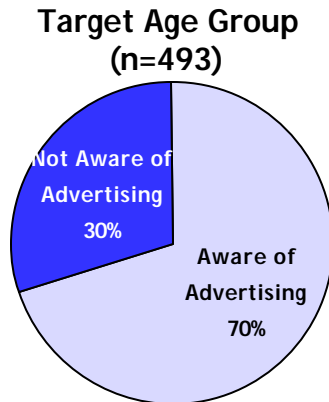
Beverage Recycling Advertising Continues To Resonate With The Target Age Demographic

The 2005 beverage recycling advertising has stronger recall among the target demographic than it does to the other age groups. However, the 2005 advertising campaign did not perform as strongly among this audience compared to the advertising done in 2001.

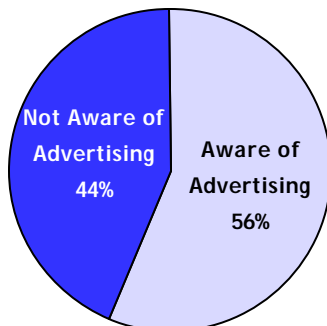
ADVERTISING RECALL BY TARGET AGE Base: Among Total California Residents

Trended

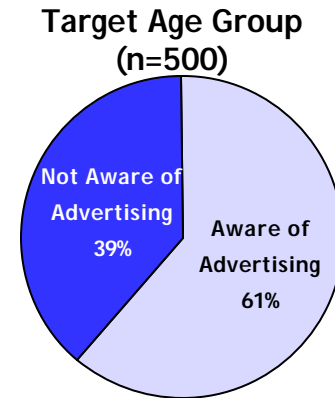
2001



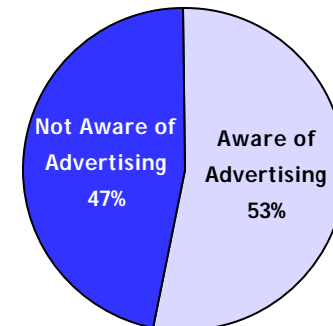
Non-Target Age Group
(n=207)



2005



Non-Target Age Group
(n=232)



Q12: In the past year, have you seen or heard any advertising about recycling beverage bottles or cans?
Target Age is age: 25 to 54 years of age

2005 Advertising Messages Do Not Speak To Spanish Speaking Residents

Overall advertising awareness remains stable for English speakers, while Spanish speakers are less likely to recall seeing or hearing ads this year. There also has been a strong shift in recall from the main message of just recycling to an environmental and social responsibility message.

ADVERTISING RECALL BY LANGUAGE DOMINANCE

Base: Among Total California Residents

Base: Among Residents Aware Of Advertising

Trended

| | Total (n=732) | | English Speaking (n=631) | | Spanish Speaking (n=101) | |
|------------------------------|------------------|-------------------------|-----------------------------|-------------------------|-----------------------------|-------------------------|
| | 2005 | Difference From 2001 | 2005 | Difference From 2001 | 2005 | Difference From 2001 |
| Advertising Awareness | 58% | -6 pts | 60% | -5 pts | 49% | -11 pts |
| Messages Recalled: | (n=440) | | (n=386) | | (n=54) | |
| Environmental Message | 50% | +6 pts | 52% | +9 pts | 43% | -9 pts |
| Recycle Message | 9 | -19 pts | 9 | -20 pts | 15 | -6 pts |
| Container Message | 4 | -5 pts | 4 | -4 pts | 0 | -15 pts |
| Responsibility Message | 19 | +12 pts | 20 | +13 pts | 14 | +6 pts |
| Personal Advantage Message | 5 | 0 pts | 5 | 0 pts | 2 | 0 pts |

Q12: In the past year, have you seen or heard any advertising about recycling beverage bottles or cans?

Q13: What was the main message the advertising was trying to communicate?

All Markets Other Than Bakersfield Have Lower Advertising Recall In 2005

Overall advertising recall by market is lower this year compared to 2001. Bakersfield is the one exception where overall advertising recall has increased. The main message recalled has also shifted from a recycle and container message to more of a socially responsible and save the environment message.

ADVERTISING AWARENESS AND MESSAGE RECALL BY MARKET

Base: Among Total California Residents

Base: Among Residents Aware Of Advertising

2005

| | Los Angeles (n=131) | | Sacramento (n=121) | | Bakersfield (n=129) | | Chico (n=129) | | San Francisco (n=121) | |
|------------------------------|------------------------|-------------------------|-----------------------|-------------------------|------------------------|-------------------------|------------------|-------------------------|--------------------------|-------------------------|
| | 2005 | Difference From 2001 | 2005 | Difference From 2001 | 2005 | Difference From 2001 | 2005 | Difference From 2001 | 2005 | Difference From 2001 |
| Advertising Awareness | 61% | -3 pts | 61% | -13 pts | 64% | +8 pts | 54% | -12 pts | 60% | -3 pts |
| Messages Recalled: | (n=78) | | (n=75) | | (n=87) | | (n=73) | | (n=73) | |
| Environmental Message | 64% | +14 pts | 52% | +13 pts | 54% | -2 pts | 52% | +11 pts | 33% | +1 pts |
| Recycle Message | 9 | -18 pts | 8 | -24 pts | 10 | -18 pts | 7 | -19 pts | 8 | -26 pts |
| Container Message | 5 | -5 pts | 5 | -2 pts | 2 | -3 pts | 1 | -4 pts | 8 | -2 pts |
| Responsibility Message | 12 | +8 pts | 22 | -16 pts | 21 | +21 pts | 18 | +3 pts | 26 | +15 pts |
| Personal Advantage Message | 5 | -4 pts | 9 | +5 pts | 0 | -6 pts | 8 | +5 pts | 6 | +2 pts |

Q12: In the past year, have you seen or heard any advertising about recycling beverage bottles or cans?

Q13: What was the main message the advertising was trying to communicate?

The Strongest Advertising Gains Are Among The African American California Residents

African American residents are much more likely to recall the ads in 2005 compared to 2001. All other ethnic groups have recall levels similar or slightly lower than 2001. The strongest messages coming through are the environmental and social responsibility themes.

ADVERTISING AWARENESS AND MESSAGE RECALL BY ETHNICITY

Base: Among Total California Residents

Base: Among Residents Aware Of Advertising

Trended

| | Caucasian (n=427) | | African-American (n=29*) | | Asian (n=32) | | Hispanic (n=208) | | Other (n=31) | |
|------------------------------|----------------------|-------------------------|-----------------------------|-------------------------|-----------------|-------------------------|---------------------|-------------------------|-----------------|-------------------------|
| | 2005 | Difference From 2001 | 2005 | Difference From 2001 | 2005 | Difference From 2001 | 2005 | Difference From 2001 | 2005 | Difference From 2001 |
| Advertising Awareness | 58% | -9 pts | 74% | +22 pts | 50% | -5 pts | 55% | -6 pts | 69% | -10 pts |
| Messages Recalled: | (n=264) | | (n=20*) | | (n=17*) | | (n=122) | | (n=22) | |
| Environmental Message | 46% | +4 pts | 73% | +29 pts | 42% | -9 pts | 54% | +4 pts | 50% | +23 pts |
| Recycle Message | 9 | -16 pts | 7 | -49 pts | 17 | -1 pts | 11 | -19 pts | 8 | -24 pts |
| Container Message | 8 | -2 pts | 0 | 0 pts | 0 | -7 pts | 0 | -8 pts | 0 | +8 pts |
| Responsibility Message | 24 | +16 pts | 8 | -2 pts | 21 | +21 pts | 17 | +9 pts | 8 | +3 pts |
| Personal Advantage Message | 5 | +1 pts | 8 | +1 pts | 0 | 0 pts | 4 | -2 pts | 8 | -1 pts |

Q12: In the past year, have you seen or heard any advertising about recycling beverage bottles or cans?

Q13: What was the main message the advertising was trying to communicate?

* Caution small base size.

Advertising Recall Is Strongest Among Residents Who Have A Higher Likelihood Of Hearing Both Radio And Television Ads

California residents who have a college education, work full-time and make above average incomes are more likely to recall the 2005 beverage recycling advertising. These residents are more likely to have exposure to radio ads through their work day commute in addition to evening and weekend television ads.

PROFILE OF THOSE AWARE OF ADVERTISING Base: Among Residents Aware Of Advertising

2005

| | Aware Of Advertising (n=440) | Indexed To Total (n=732) |
|--------------------------|---------------------------------|-----------------------------|
| <u>Gender</u> | | |
| Male | 50% | 100 |
| Female | 50 | 100 |
| <u>Age</u> | | |
| 21-34 | 32% | 110 |
| 35-44 | 22 | 100 |
| 45-65 | 46 | 94 |
| <u>Ethnicity</u> | | |
| Caucasian | 46% | 100 |
| African-American | 10 | 125 |
| Hispanic | 33 | 94 |
| Other | 11 | 58 |
| <u>Education</u> | | |
| Some High School or less | 11% | 85 |
| High School graduate | 26 | 93 |
| Some College | 24 | 114 |
| College Graduate | 22 | 92 |
| Graduate School | 16 | 114 |

| | Aware Of Advertising (n=440) | Indexed To Total (n=732) |
|--------------------------------|---------------------------------|-----------------------------|
| <u>Employment</u> | | |
| Full-time | 59% | 105 |
| Part-time | 9 | 100 |
| Student | 6 | 120 |
| Homemaker | 8 | 80 |
| Retired | 13 | 87 |
| Unemployed | 7 | 100 |
| <u>Income</u> | | |
| Less than \$30,000 | 27% | 87 |
| \$30,000 to less than \$50,000 | 26 | 108 |
| \$50,000 to less than \$70,000 | 15 | 100 |
| \$70,000 or more | 33 | 110 |
| <u>Marital Status</u> | | |
| Single | 32% | 97 |
| Married | 54 | 108 |
| Widowed | 13 | 76 |

Index - This analytic device is used to compare the "aware of advertising" ratings to California in total, to demonstrate the relationship.

Over 100: Individual rating is higher than the total rating (e.g. 120 means 20% higher than average).

100 even: Individual rating is equal to total rating.

Under 100: Individual rating is lower than the total rating (e.g. 80 means 20% lower than average).

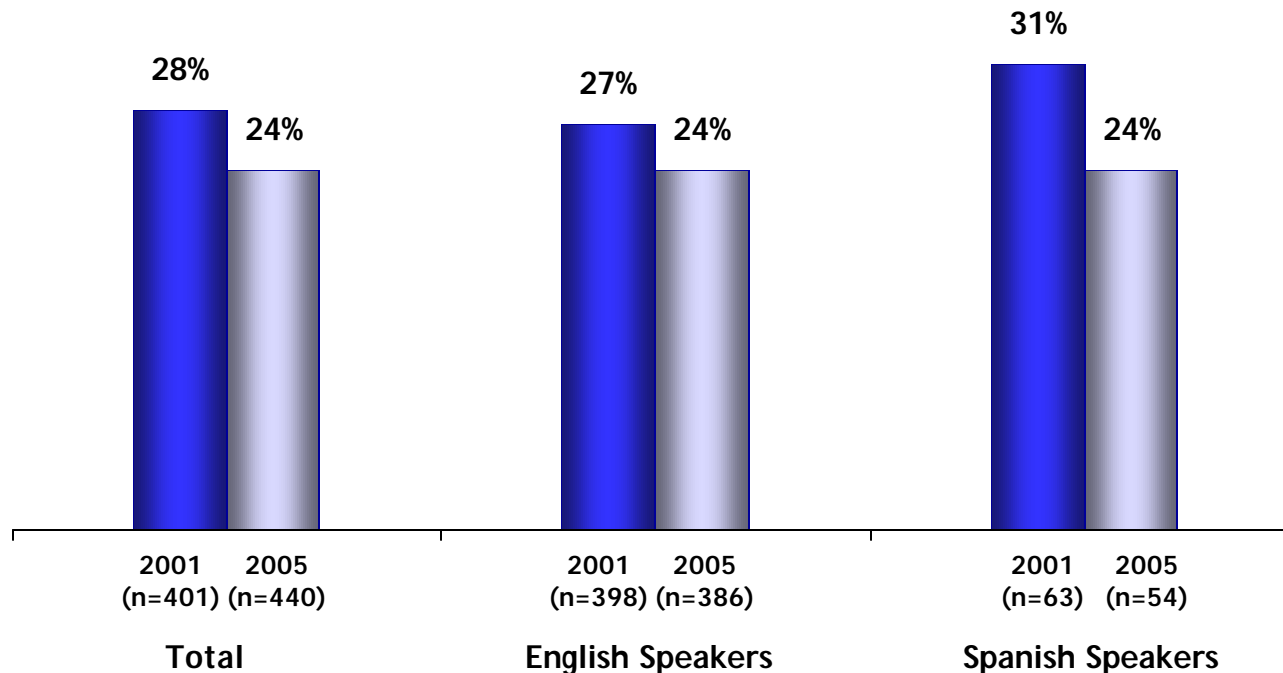
Earlier Campaigns Generated A Slightly Stronger Buzz

Just under one-quarter of California residents who saw the beverage recycling ads have discussed it with their friends and family. In 2001 the Spanish speaking residents were much more likely to discuss the ads than in 2005.

DISCUSSED ADVERTISING WITH OTHERS BY LANGUAGE DOMINANCE

Base: Among Residents Aware Of Advertising

Trended



Q25: In the past few months have you discussed any beverage container recycling ads with your friends or family?

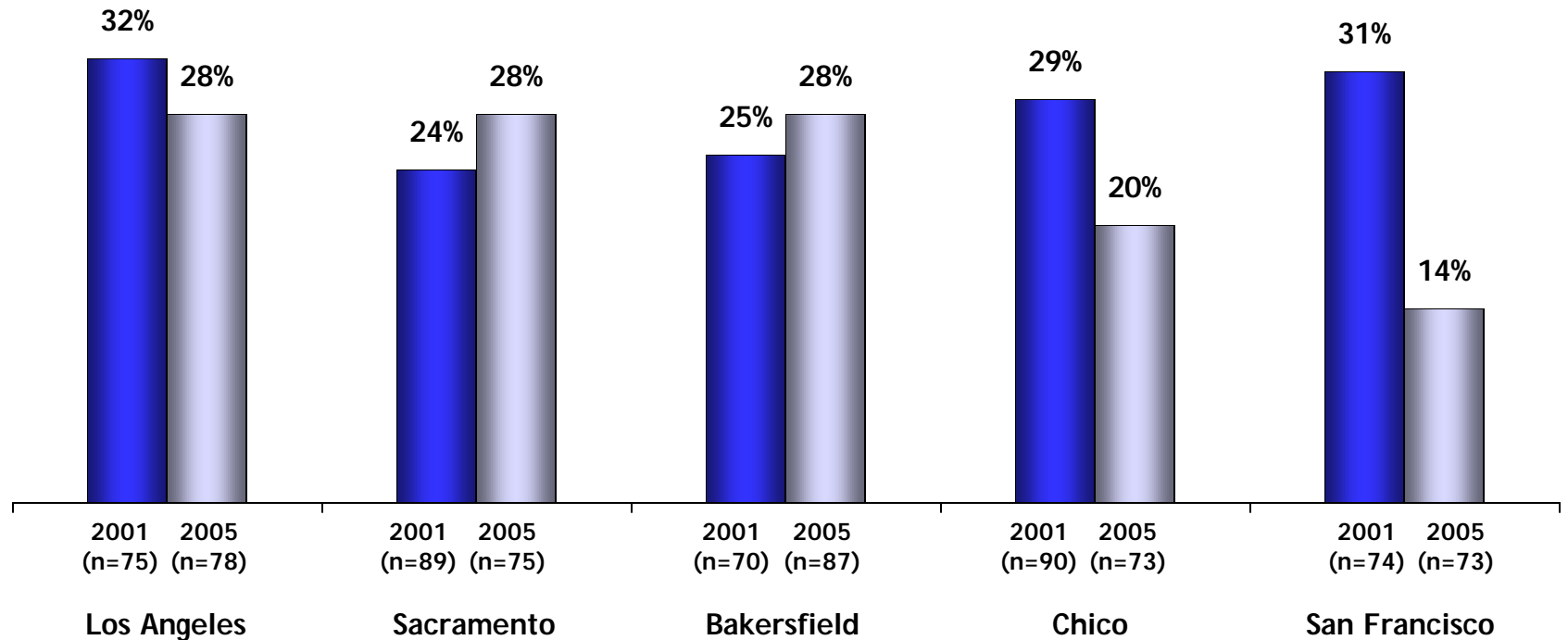
Sacramento And Bakersfield Are More Likely To Be Discussing 2005 Beverage Recycling Ads

The 2005 advertising appeals to Bakersfield and Sacramento residents, where just over one-quarter discuss the ads with family and friends.

DISCUSSED ADVERTISING WITH FRIENDS AND FAMILY BY MARKET

Base: Among Residents Aware Of Advertising

Trended



Q25: In the past few months have you discussed any beverage container recycling ads with your friends or family?

Television Ads Are The Most Often Recalled

The majority of California residents recall seeing the beverage recycling ads on television, with print and radio having the next highest impact. Billboards, particularly in Sacramento also have an impact. San Francisco residents do not have as strong recall of the television advertising as the other markets.

ADVERTISING MEDIUM BY MARKET AND LANGUAGE DOMINANCE

Base: Among Total California Residents

Base: Among Residents Aware Of Advertising

2005

| | Regional Comparison | | | | | Primary Language | |
|------------------------------|------------------------|-----------------------|------------------------|------------------|--------------------------|--------------------|--------------------|
| | Los Angeles (n=131) | Sacramento (n=121) | Bakersfield (n=129) | Chico (n=129) | San Francisco (n=121) | English (n=631) | Spanish (n=101) |
| Advertising Awareness | 61% | 61% | 64% | 54% | 60% | 60% | 49% |
| Medium: | (n=78) | (n=75) | (n=87) | (n=73) | (n=73) | (n=386) | (n=54) |
| Television | 65% | 67% | 75% | 77% | 49% | 67% | 59% |
| Radio | 14 | 16 | 15 | 15 | 13 | 14 | 10 |
| Billboards | 10 | 17 | 10 | 7 | 5 | 10 | 2 |
| Print | 9 | 15 | 1 | 11 | 15 | 10 | 1 |
| Bus posters/transit ads | 2 | 1 | 0 | 1 | 6 | 2 | 7 |
| Bumper stickers | 2 | 0 | 0 | 0 | 2 | 1 | 4 |
| Wild postings/flyers | 1 | 2 | 4 | 0 | 4 | 2 | 8 |
| Airport posters | 1 | 0 | 1 | 0 | 0 | <1 | 1 |
| Promotional events | 1 | 0 | 1 | 3 | 1 | 1 | 2 |

Q12: In the past year, have you seen or heard any advertising about recycling beverage bottles or cans?

Q14: Where did you see or hear that advertising?

Television Ads Most Strongly Recalled For All Ethnicities

The majority of all residents regardless of ethnic background recall seeing a beverage recycling ad on television. The one exception are the Asian consumers who also have very strong print and billboard recall.

ADVERTISING MEDIUM BY ETHNICITY

Base: Among Total California Residents

Base: Among Residents Aware Of Advertising

2005

| | Caucasian (n=427) | African- American (n=29*) | Asian (n=32) | Hispanic (n=208) | Other (n=31) |
|------------------------------|----------------------|---------------------------------|-----------------|---------------------|-----------------|
| Advertising Awareness | 58% | 74% | 50% | 55% | 69% |
| Medium: | (n=264) | (n=20*) | (n=17*) | (n=122) | (n=22*) |
| Television | 68% | 56% | 48% | 68% | 80% |
| Radio | 19 | 11 | 7 | 9 | 10 |
| Print | 7 | 15 | 26 | 5 | 8 |
| Billboards | 8 | 13 | 20 | 9 | 8 |
| Bus posters/transit ads | 3 | 0 | 0 | 4 | 0 |
| Wild postings/flyers | 3 | 0 | 0 | 5 | 3 |
| Promotional events | 2 | 0 | 0 | 1 | 6 |
| Bumper stickers | 1 | 0 | 0 | 3 | 0 |
| Airport posters | 1 | 0 | 0 | <1 | 0 |

Q12: In the past year, have you seen or heard any advertising about recycling beverage bottles or cans?

Q14: Where did you see or hear that advertising?

* Caution small base size.

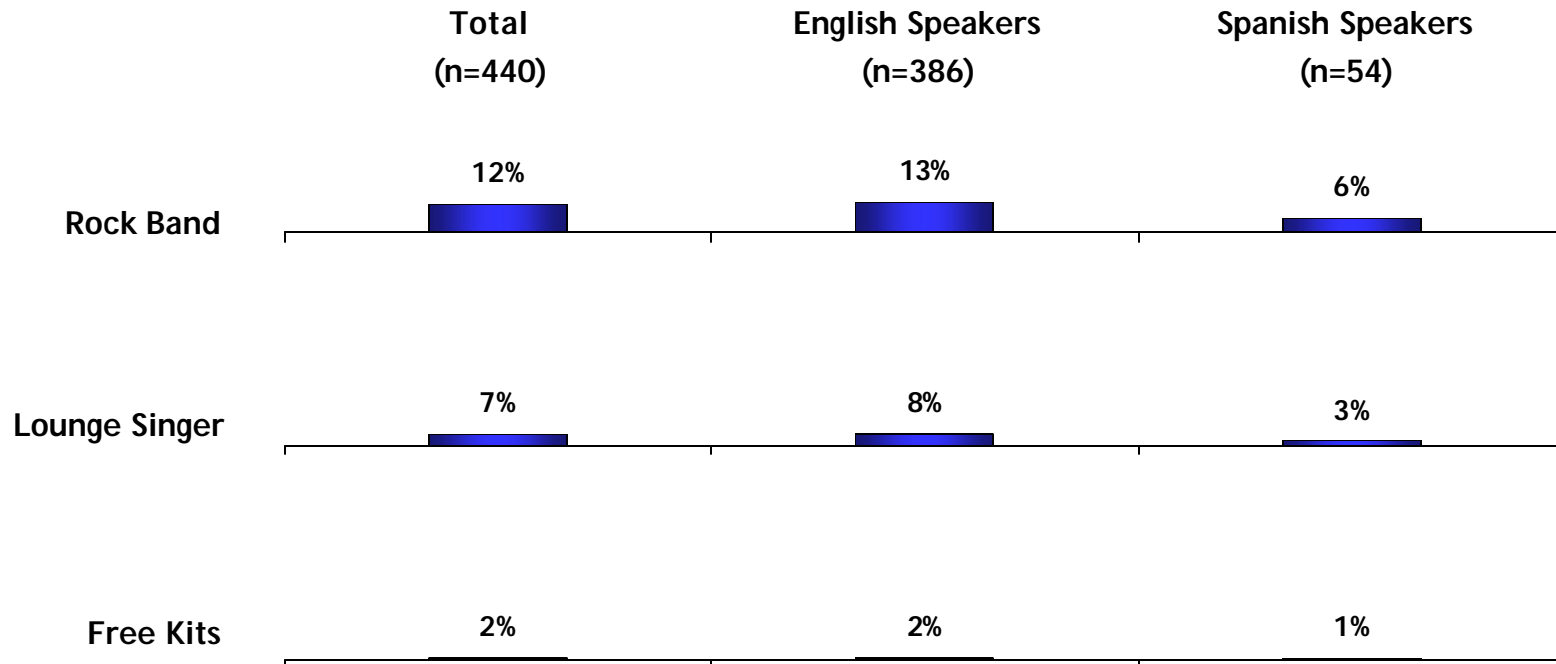
Overall Recall Of The Specific Ad Executions Is Low In California

Very few California residents recall the three specific ads. The most recalled is the Rock Band ad, however levels are very low. Spanish speaking residents remember the ads at about half the level of the English speaking residents.

SPECIFIC ADVERTISEMENT AWARENESS

Base: Among Residents Aware Of Advertising

2005



Q17: Do you remember seeing a TV ad where a non-recycled beverage container inspired a rock band to write a song titled, "Who Threw the Bottle in the Trash?" to motivate people to recycle?

Q24a. Do you remember hearing a musical radio ad where a lounge singer sings about a bottle that has a second chance at life as a result of it being recycled?

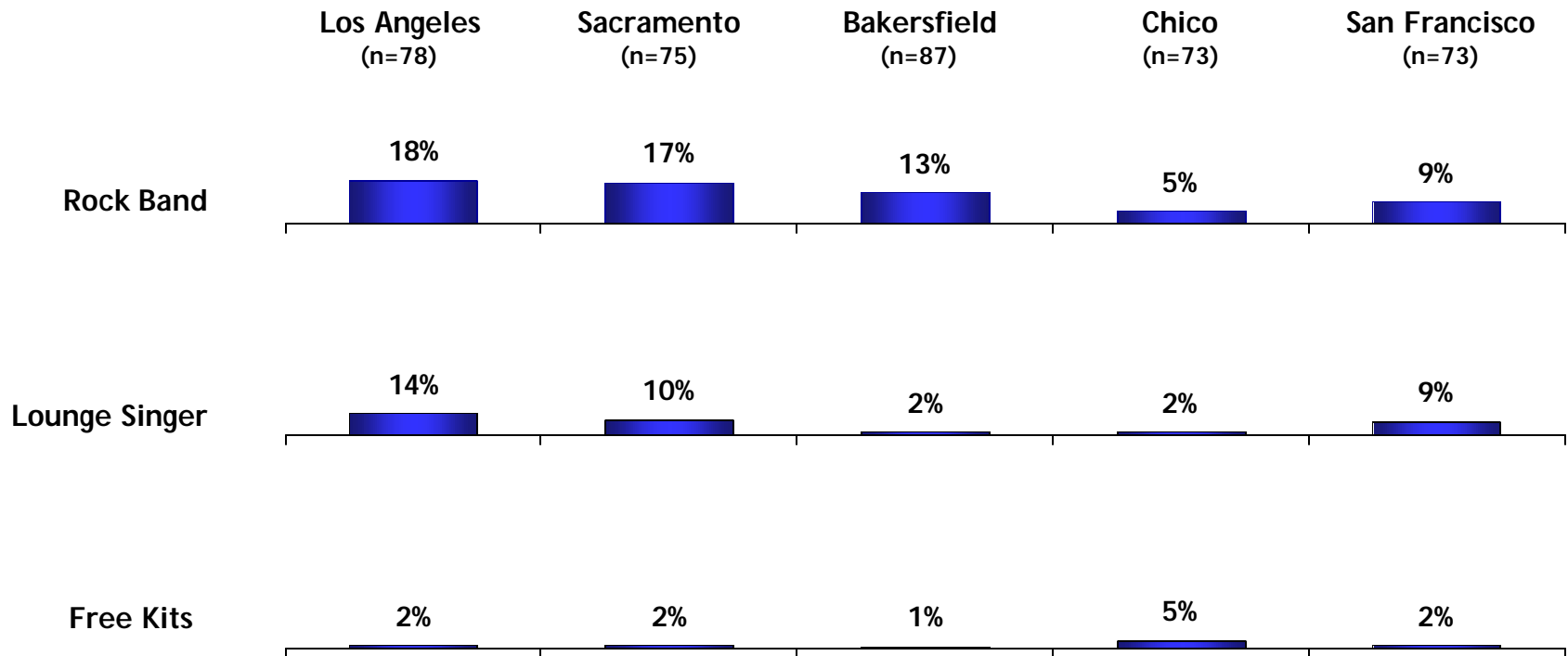
Q24c. Do you remember hearing a radio ad with an announcer offering "free" recycling starter kits for businesses through the bottlesandcans.com Web site?

The Rock Band Ad Had The Strongest Appeal In All Markets

Residents in Los Angeles and Sacramento have the strongest recall of both the Rock Band and the Lounge Singer ads. Chico residents have the strongest radio recall of the “free” recycling starter kits ads.

SPECIFIC ADVERTISING AWARENESS BY MARKET Base: Among Residents Aware Of Advertising

2005



Q17: Do you remember seeing a TV ad where a non-recycled beverage container inspired a rock band to write a song titled, “Who Threw the Bottle in the Trash?” to motivate people to recycle?

Q24a. Do you remember hearing a musical radio ad where a lounge singer sings about a bottle that has a second chance at life as a result of it being recycled?

Q24c. Do you remember hearing a radio ad with an announcer offering “free” recycling starter kits for businesses through the bottlesandcans.com Web site?

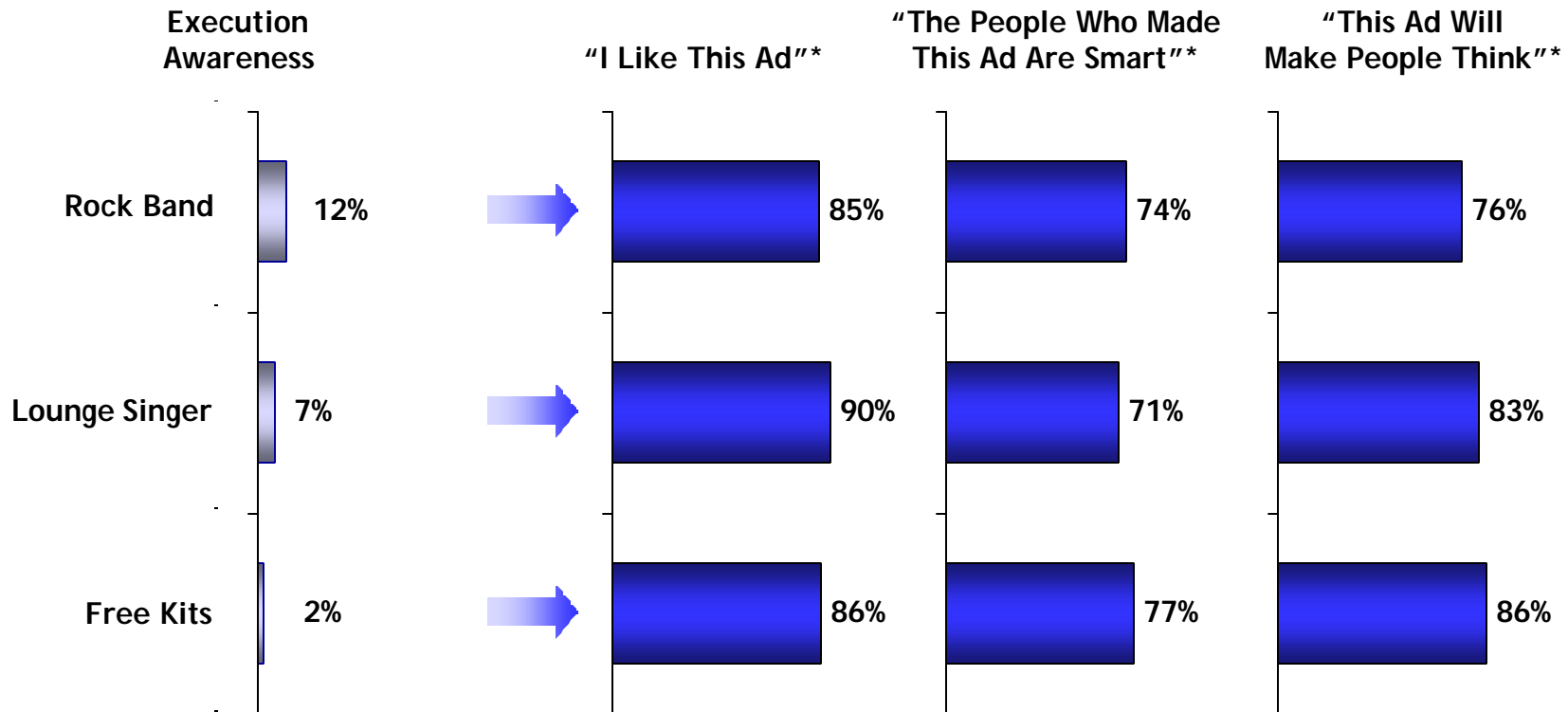
Residents That Recall The Ads Liked Them

Of those residents who are aware of the ads, the Lounge Singer ad is the most well received. The free kit ad, although with very low recall, is the most likely ad to make people think about recycling.

EXECUTION DIAGNOSTICS

Base: Among Residents Aware Of Advertising (n=440)

2005



Q16: Which television ads do you remember? What others?

Q17: Do you remember seeing a TV ad where a non-recycled beverage container inspired a rock band to write a song titled, "Who Threw the Bottle in the Trash?" to motivate people to recycle?

Q23b: Which radio ads do you remember? What others?

Q24a: Do you remember hearing a musical radio ad where a lounge singer sings about a bottle that has a second chance at life as a result of it being recycled?

Q24c: Do you remember hearing a radio ad with an announcer offering "free" recycling starter kits for businesses through the bottlesandcans.com Web site?

Q18/24b/24d: What did you think about this ad?

* Ratings include "Strongly Agree" and "Agree"

Chapter 2: Recycling Behavior And Involvement

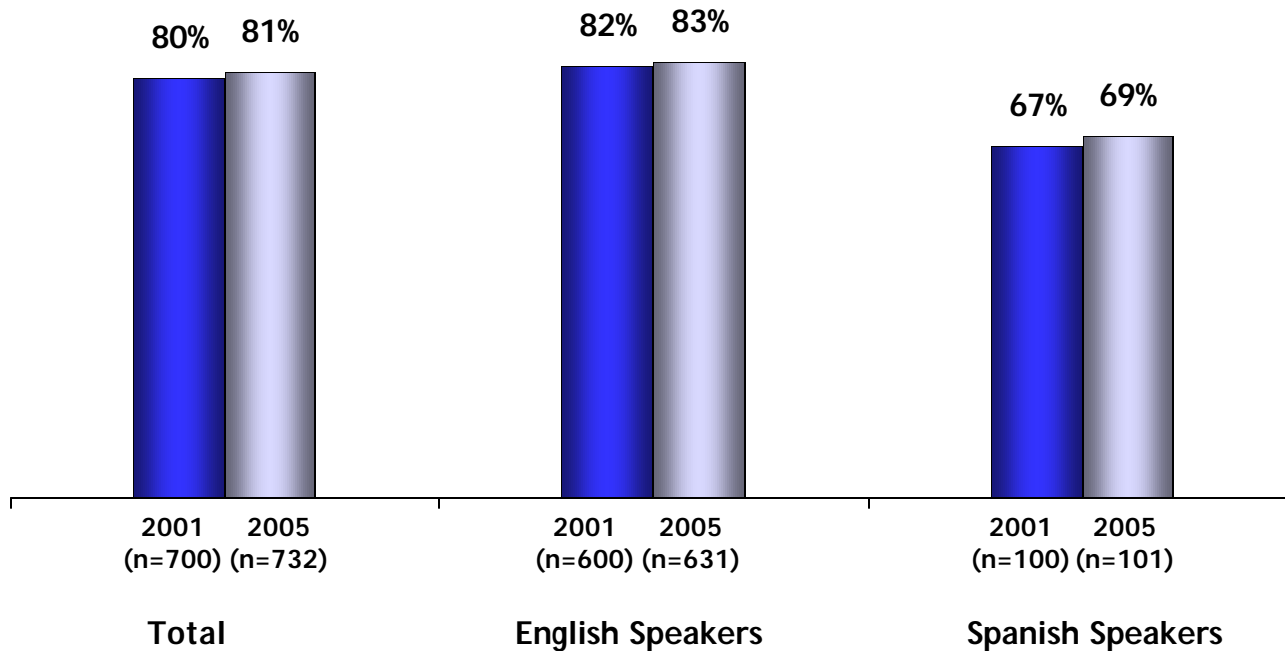
Recycling Continues To Be A Well Established Habit For California Residents

The number of California residents recycling has remained consistent since 2001. More English speaking residents recycle compared to their Spanish speaking counterparts.

HOUSEHOLD RECYCLING BY LANGUAGE DOMINANCE

Base: Among Total California Residents

Trended



Q4a: Do you or does anyone in your household currently recycle?

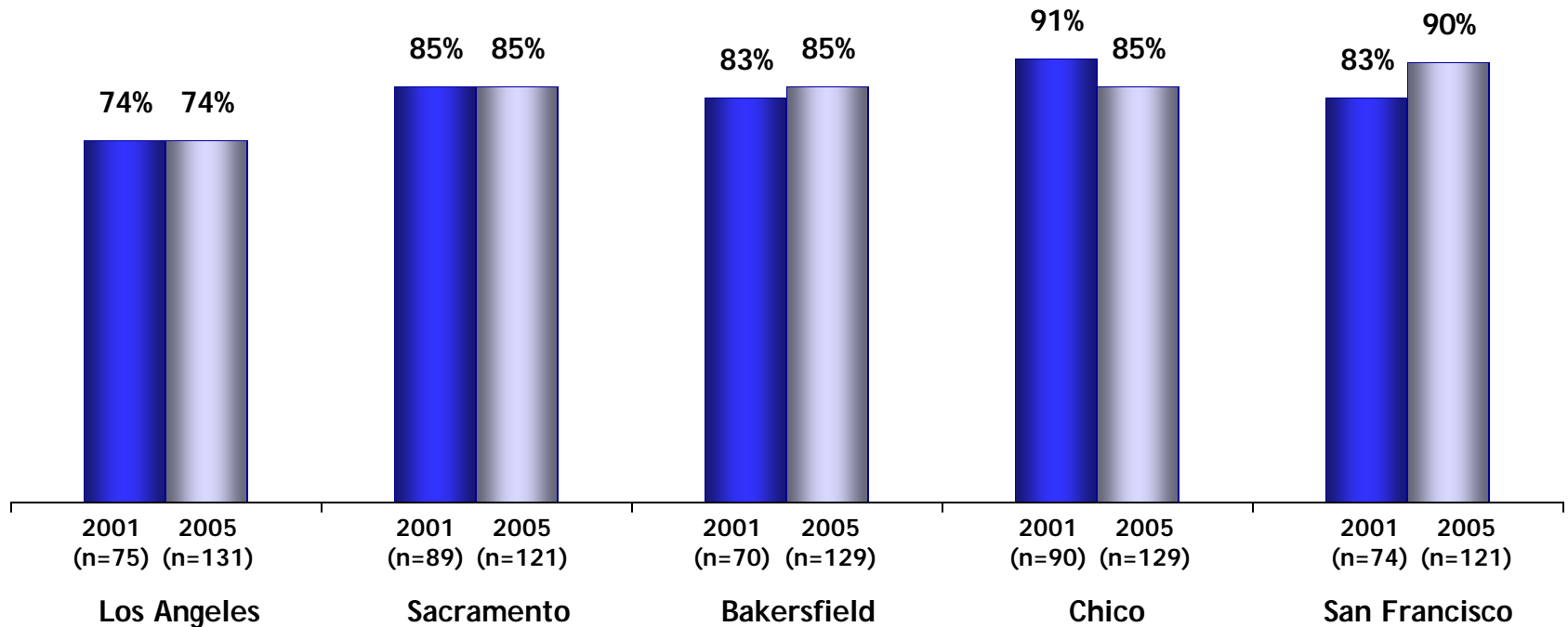
Recycling Is Stable By Market

Overall recycling behavior has remained generally stable since 2001 with a few exceptions by market. The number of Chico residents that recycle has slightly decreased since 2001. San Francisco residents are recycling the most of all the markets surveyed, while Los Angeles still has the lowest level of recycling residents.

HOUSEHOLD RECYCLING BY MARKET

Base: Among Total California Residents

Trended



Q4a: Do you or does anyone in your household currently recycle?

More Established Residents Are More Likely To Recycle

Recycling residents tend to be established adults that are over 45 years old, employed full time, married, and own their residence. They potentially have more access to information, which may prompt them to recycle more than other demographic groups.

PROFILE OF RECYCLERS

Base: Among Residents Who Recycle

2005

81% Of California Residents Recycle

| | Those Who Recycle (n=613) | Indexed To Total (n=732) |
|--------------------------|---------------------------------|--------------------------------|
| <u>Gender</u> | | |
| Male | 49% | 98 |
| Female | 51 | 102 |
| <u>Age</u> | | |
| 21-34 | 29% | 100 |
| 35-44 | 22 | 100 |
| 45-65 | 49 | 100 |
| <u>Ethnicity</u> | | |
| Caucasian | 49% | 107 |
| African-American | 7 | 88 |
| Hispanic | 32 | 91 |
| Other | 12 | 109 |
| <u>Education</u> | | |
| Some High School or less | 12% | 92 |
| High School graduate | 27 | 96 |
| Some College | 21 | 100 |
| College Graduate | 25 | 104 |
| Graduate School | 14 | 100 |

| | Those Who Recycle (n=613) | Indexed To Total (n=732) |
|--------------------------------|---------------------------------|--------------------------------|
| <u>Employment</u> | | |
| Full-time | 55% | 98 |
| Part-time | 10 | 111 |
| Student | 5 | 100 |
| Homemaker | 10 | 100 |
| Retired | 16 | 107 |
| Unemployed | 8 | 114 |
| <u>Income</u> | | |
| Less than \$30,000 | 29% | 94 |
| \$30,000 to less than \$50,000 | 23 | 96 |
| \$50,000 to less than \$70,000 | 16 | 107 |
| \$70,000 or more | 32 | 107 |
| <u>Ownership of Dwelling</u> | | |
| Own | 65% | 108 |
| Rent | 35 | 88 |
| <u>Marital Status</u> | | |
| Single | 31% | 94 |
| Married | 52 | 104 |
| Widowed | 17 | 100 |

Index - This analytic device is used to compare the recycler ratings to California in total, to demonstrate the relationship.
Over 100: Individual recycler rating is higher than the total rating (e.g. 120 means 20% higher than average).
100 even: Individual recycler rating is equal to total rating.
Under 100: Individual recycler rating is lower than the total rating (e.g. 80 means 20% lower than average).

Convenience And Ease Of Use Have A Big Impact On Recycling

California residents are aware of multiple means for recycling, however the majority mainly use two methods - curbside recycling and a staffed parking lot. Two other methods with strong awareness and availability are self service centers and commercial recycling centers, however these two methods have lower usage levels. These two methods require more commitment and involvement from residents and may not be as appealing.

RECYCLING PROGRAM AWARENESS, AVAILABILITY, USAGE

Base: Among Total California Residents (n=732)

2005

| | Awareness | Availability | Usage |
|---|-----------|--------------|-------|
| Curbside recycling using special bins | 85% | 56% | 42% |
| Return containers to staffed parking lot | 80% | 59% | 21% |
| Bring containers to self-service center | 63% | 34% | 9% |
| Bring containers to commercial recycling center | 70% | 46% | 15% |
| Give containers to charity | 47% | 27% | 5% |
| Donate containers in drop-off bin | 43% | 23% | 2% |
| Throw recyclables away with normal garbage | 58% | 42% | 3% |

Q1: What ways are you aware of that beverage containers can be recycled?

Q2: Have you ever heard of...?

Q3: What beverage container recycling programs or ways beverage containers can be recycled are there available in your neighborhood or community?

Q4b: I'd like you to think about beverage containers that may be recycled while you are at home. Do you or does anyone in your household currently recycle?

Curbside Recycling Continues To Increase In Top Of Mind Awareness For California Residents

More people are aware of curbside recycling and returning containers to a self-service center than in previous waves. However, top of mind awareness of bringing beverage containers to a staffed parking lot or commercial recycling center has decreased since 2001.

UNAIDED AWARENESS OF RECYCLING PROGRAMS

Trended

Base: Among Total California Residents

| | Pre-Wave (n=409) | Post Wave 1 (n=301) | Post Wave 2 (n=700) | Post Wave 3 (n=732) |
|---|---------------------|------------------------|------------------------|------------------------|
| Curbside recycling using special bins | 41% | 45% | 46% | 54% |
| Return containers to staffed parking lot | 20 | 34 | 39 | 28 |
| Bring containers to self-service center | 8 | 12 | 10 | 14 |
| Bring containers to commercial recycling center | 49 | 27 | 18 | 17 |
| Give containers to charity | 3 | 4 | 5 | 5 |
| Donate containers in drop-off bin | 4 | 5 | 4 | 5 |
| Throw recyclables away with normal garbage | 2 | 5 | 4 | 5 |

Q1: What ways are you aware of that beverage containers can be recycled?

California Residents Are Aware Of Multiple Recycling Options

Again, curbside recycling and returning containers to staffed parking lots are the most familiar forms of recycling to California residents.

TOTAL AWARENESS OF RECYCLING PROGRAMS

Base: Among Total California Residents

Trended

| | Pre-Wave (n=409) | Post Wave 1 (n=301) | Post Wave 2 (n=700) | Post Wave 3 (n=732) |
|---|---------------------|------------------------|------------------------|------------------------|
| Curbside recycling using special bins | 82% | 88% | 82% | 85% |
| Return containers to staffed parking lot | 81 | 83 | 83 | 80 |
| Bring containers to self-service center | 63 | 59 | 64 | 63 |
| Bring containers to commercial recycling center | 89 | 72 | 73 | 70 |
| Give containers to charity | 56 | 42 | 44 | 47 |
| Donate containers in drop-off bin | 53 | 36 | 50 | 43 |
| Throw recyclables away with normal garbage | 84 | 42 | 64 | 58 |

Q1: What ways are you aware of that beverage containers can be recycled?

Q2: Have you ever heard of?

Awareness Of Recycling Methods Is Strong In All Markets

Curbside recycling is the most recalled program among the five markets, with the exception of Bakersfield and Chico where residents are more aware of returning containers to staffed parking lots. English speakers have an overall stronger awareness of the various recycling programs.

TOTAL AWARENESS OF RECYCLING PROGRAMS BY MARKET AND LANGUAGE DOMINANCE

Base: Among Total California Residents

2005

| | Los Angeles (n=131) | Sacramento (n=121) | Bakersfield (n=129) | Chico (n=129) | San Francisco (n=121) | English Speakers (n=631) | Spanish Speakers (n=101) |
|---|------------------------|-----------------------|------------------------|------------------|--------------------------|--------------------------------|--------------------------------|
| Curbside recycling using special bins | 89% | 94% | 76% | 85% | 97% | 88% | 70% |
| Return containers to staffed parking lot | 87 | 88 | 80 | 91 | 85 | 86 | 53 |
| Bring containers to self-service center | 74 | 62 | 59 | 65 | 62 | 65 | 52 |
| Bring containers to commercial recycling center | 79 | 75 | 69 | 81 | 75 | 76 | 40 |
| Give containers to charity | 51 | 49 | 51 | 57 | 38 | 49 | 34 |
| Donate containers in drop-off bin | 49 | 47 | 49 | 51 | 39 | 47 | 25 |
| Throw recyclables away with normal garbage | 71 | 63 | 56 | 68 | 60 | 64 | 33 |

Q1: What ways are you aware of that beverage containers can be recycled?

Q2: Have you heard of...?

Recycling Methods Available To Residents Is Consistent From 2001 to 2005

The two methods most available in California are curbside recycling bins and staffed parking lots.

RECYCLING METHOD AVAILABILITY TRENDS

Base: Among Total California Residents

Trended

| | Pre-Wave (n=409) | Post Wave 1 (n=301) | Post Wave 2 (n=700) | Post Wave 3 (n=732) |
|---|---------------------|------------------------|------------------------|------------------------|
| Curbside recycling using special bins | 43% | 50% | 57% | 56% |
| Return containers to staffed parking lot | 52 | 55 | 62 | 59 |
| Bring containers to self-service center | 21 | 28 | 34 | 34 |
| Bring containers to commercial recycling center | 53 | 44 | 53 | 46 |
| Give containers to charity | 20 | 15 | 28 | 27 |
| Donate containers in drop-off bin | 15 | 13 | 27 | 23 |
| Throw recyclables away with normal garbage | 33 | 23 | 50 | 42 |

Q3: What beverage container recycling programs or ways beverage containers can be recycled are there available in your neighborhood or community?

Spanish Speaking Residents Do Not Feel That They Have Many Recycling Options Available To Them

Availability of recycling methods remains unchanged for the English speaking residents. On the other hand, recycling method availability appears to have decreased among the Latino communities.

RECYCLING METHOD AVAILABILITY BY LANGUAGE DOMINANCE

Base: Among Total California Residents

Trended

| | English Speakers | | Spanish Speakers | |
|---|------------------|-----------------|------------------|-----------------|
| | 2001 (n=600) | 2005 (n=631) | 2001 (n=100) | 2005 (n=101) |
| Curbside recycling using special bins | 59% | 61% | 69% | 34% |
| Return containers to staffed parking lot | 66 | 66 | 45 | 28 |
| Bring containers to self-service center | 35 | 35 | 31 | 29 |
| Bring containers to commercial recycling center | 56 | 50 | 34 | 28 |
| Give containers to charity | 31 | 30 | 12 | 12 |
| Donate containers in drop-off bin | 28 | 25 | 22 | 12 |
| Throw recyclables away with normal garbage | 54 | 49 | 33 | 11 |

Q3: What beverage container recycling programs or ways beverage containers can be recycled are there available in your neighborhood or community?

Curbside Recycling And Staffed Parking Lots Continue To Be The Methods Of Preference

The methods California residents are using to recycle remain consistent with 2001. The majority use the curbside recycling program with the least amount of people donating their recyclable beverage containers to charity or drop off bins.

RECYCLING METHOD USAGE

Base: Among Total California Residents

Trended

| | Pre-Wave (n=409) | Post Wave 1 (n=301) | Post Wave 2 (n=700) | Post Wave 3 (n=732) |
|---|---------------------|------------------------|------------------------|------------------------|
| Curbside recycling using special bins | 32% | 36% | 41% | 42% |
| Return containers to staffed parking lot | 18 | 27 | 23 | 21 |
| Bring containers to self-service center | 4 | 6 | 5 | 9 |
| Bring containers to commercial recycling center | 38 | 23 | 17 | 15 |
| Give containers to charity | 5 | 4 | 3 | 5 |
| Donate containers in drop-off bin | 3 | 3 | 2 | 2 |
| Throw recyclables away with normal garbage | 15 | 14 | 1 | 3 |

Q4b: Which programs or ways are being used to recycle beverage containers? What others?

Curbside Recycling Appeals To Both English And Spanish Speakers

Curbside recycling is the most popular method among both English and Spanish speaking residents. However, English speakers are more likely to utilize the recycling methods more than Spanish speaking residents, especially with regard to returning containers to staffed parking lots or self-service centers.

RECYCLING METHOD USAGE BY LANGUAGE DOMINANCE

Base: Among Total California Residents

Trended

| | English Speakers | | Spanish Speakers | |
|---|------------------|-----------------|------------------|-----------------|
| | 2001 (n=600) | 2005 (n=631) | 2001 (n=100) | 2005 (n=101) |
| Curbside recycling using special bins | 42% | 45% | 35% | 28% |
| Return containers to staffed parking lot | 23 | 23 | 23 | 12 |
| Bring containers to self-service center | 5 | 10 | 2 | 1 |
| Bring containers to commercial recycling center | 18 | 16 | 7 | 10 |
| Give containers to charity | 3 | 5 | 3 | 1 |
| Donate containers in drop-off bin | 2 | 3 | 0 | 1 |
| Throw recyclables away with normal garbage | 2 | 3 | 1 | 2 |

Q4b: Which programs or ways are being used to recycle beverage containers? What others?

Curbside Recycling Is Utilized By More Affluent Home Owners

Due to the availability of the program among homes and residential neighborhoods, curbside recyclers are more likely to be homeowners. Users of this method are also more likely to have completed some college, be employed, and earn upwards of \$40,000 per year.

PROFILE OF CURBSIDE RECYCLERS USING SPECIAL BINS

Base: Among Residents Using Curbside

2005

| | Use Curbside Recycling (n=334) | Indexed To Total (n=732) |
|------------------------------|--------------------------------------|--------------------------------|
| <u>Gender</u> | | |
| Male | 49% | 98 |
| Female | 51 | 102 |
| <u>Age</u> | | |
| 21-34 | 23% | 79 |
| 35-44 | 25 | 114 |
| 45-65 | 52 | 106 |
| <u>Ethnicity</u> | | |
| Caucasian | 52% | 113 |
| Hispanic | 27 | 77 |
| Other | 21 | 111 |
| <u>Marital Status</u> | | |
| Married | 57% | 114 |
| Not-Married | 43 | 86 |

| | Use Curbside Recycling (n=334) | Indexed To Total (n=732) |
|-------------------------------------|--------------------------------------|--------------------------------|
| <u>Ownership of Dwelling</u> | | |
| Own | 68% | 113 |
| Rent | 32 | 80 |
| <u>Education</u> | | |
| High School or less | 29% | 71 |
| Some College or more | 71 | 120 |
| <u>Employment</u> | | |
| Employed | 67% | 102 |
| Unemployed | 33 | 97 |
| <u>Income</u> | | |
| Less than \$40,000 | 31% | 74 |
| \$40,000 or more | 69 | 119 |

Staffed Parking Lots Are Appealing To Female Homeowners

Those that bring containers to staffed parking lots are more likely to be female, employed, and own their home. This is a slight shift from 2001 where this method appealed more to the renter market.

PROFILE OF STAFFED PARKING LOT RECYCLERS

Base: Among Residents Returning To Staffed Parking Lot

2005

| | Use Staffed Parking Lot (n=172) | Indexed To Total (n=732) |
|------------------------------|---------------------------------------|--------------------------------|
| <u>Gender</u> | | |
| Male | 45% | 90 |
| Female | 55 | 110 |
| <u>Age</u> | | |
| 21-34 | 25% | 86 |
| 35-44 | 23 | 105 |
| 45-65 | 52 | 106 |
| <u>Ethnicity</u> | | |
| Caucasian | 58% | 126 |
| Hispanic | 27 | 77 |
| Other | 15 | 79 |
| <u>Marital Status</u> | | |
| Married | 54% | 108 |
| Not-Married | 46 | 92 |

| | Use Staffed Parking Lot (n=172) | Indexed To Total (n=732) |
|-------------------------------------|---------------------------------------|--------------------------------|
| <u>Ownership of Dwelling</u> | | |
| Own | 70% | 117 |
| Rent | 30 | 75 |
| <u>Education</u> | | |
| High School or less | 42% | 102 |
| Some College or more | 58 | 98 |
| <u>Employment</u> | | |
| Employed | 64% | 97 |
| Unemployed | 36 | 106 |
| <u>Income</u> | | |
| Less than \$40,000 | 43% | 102 |
| \$40,000 or more | 57 | 98 |

Self Service Centers Are Utilized By Older Adults

Recyclers that utilize self-service facilities are more likely to have some college education and be employed.

PROFILE OF SELF-SERVICE CENTER RECYCLERS

Base: Among Residents Bringing To Self-Service Center

2005

| | Use Self-Service Center (n=69) | Indexed To Total (n=732) |
|------------------------------|--------------------------------------|--------------------------------|
| <u>Gender</u> | | |
| Male | 49% | 98 |
| Female | 51 | 102 |
| <u>Age</u> | | |
| 21-34 | 28% | 97 |
| 35-44 | 23 | 105 |
| 45-65 | 50 | 102 |
| <u>Ethnicity</u> | | |
| Caucasian | 61% | 133 |
| Hispanic | 30 | 86 |
| Other | 9 | 47 |
| <u>Marital Status</u> | | |
| Married | 54% | 108 |
| Not-Married | 46 | 92 |

| | Use Self-Service Center (n=69) | Indexed To Total (n=732) |
|-------------------------------------|--------------------------------------|--------------------------------|
| <u>Ownership of Dwelling</u> | | |
| Own | 61% | 102 |
| Rent | 39 | 98 |
| <u>Education</u> | | |
| High School or less | 37% | 90 |
| Some College or more | 65 | 110 |
| <u>Employment</u> | | |
| Employed | 72% | 109 |
| Unemployed | 28 | 82 |
| <u>Income</u> | | |
| Less than \$40,000 | 40% | 95 |
| \$40,000 or more | 58 | 100 |

Retired Residents Are Utilizing Commercial Centers

Bringing beverage containers to a commercial recycling center is popular among those that are single/widowed, 45 years or older and most likely Caucasian.

PROFILE OF COMMERCIAL CENTER RECYCLERS

Base: Among Residents Bringing To Commercial Recycling Center

2005

| | Commerical Recycling Center (n=104) | Indexed To Total (n=732) |
|------------------------------|--|--------------------------------|
| <u>Gender</u> | | |
| Male | 49% | 98 |
| Female | 51 | 102 |
| <u>Age</u> | | |
| 21-34 | 25% | 86 |
| 35-44 | 18 | 82 |
| 45-65 | 58 | 118 |
| <u>Ethnicity</u> | | |
| Caucasian | 53% | 115 |
| Hispanic | 33 | 94 |
| Other | 14 | 74 |
| <u>Marital Status</u> | | |
| Married | 43% | 86 |
| Not-Married | 57 | 114 |

| | Commerical Recycling Center (n=104) | Indexed To Total (n=732) |
|-------------------------------------|--|--------------------------------|
| <u>Ownership of Dwelling</u> | | |
| Own | 63% | 105 |
| Rent | 37 | 93 |
| <u>Education</u> | | |
| High School or less | 42% | 102 |
| Some College or more | 58 | 98 |
| <u>Employment</u> | | |
| Employed | 60% | 91 |
| Unemployed | 40 | 118 |
| <u>Income</u> | | |
| Less than \$40,000 | 36% | 86 |
| \$40,000 or more | 64 | 110 |

Charitable Donation Is Utilized By The More Affluent And Established

The recyclers that donate their beverage containers are more likely to be affluent female residents that are middle aged that have some form of higher education and earn an income above \$40,000. This type of recycler does not potentially need the refund money and therefore donates containers toward a good cause.

PROFILE OF CHARITY RECYCLERS

Base: Among Residents Giving To Charity

2005

| | Donate to Charity (n=39) | Indexed To Total (n=732) |
|------------------------------|--------------------------------|--------------------------------|
| <u>Gender</u> | | |
| Male | 37% | 74 |
| Female | 63 | 126 |
| <u>Age</u> | | |
| 21-34 | 21% | 72 |
| 35-44 | 11 | 50 |
| 45-65 | 70 | 143 |
| <u>Ethnicity</u> | | |
| Caucasian | 64% | 139 |
| Hispanic | 36 | 103 |
| Other | 0 | 0 |
| <u>Marital Status</u> | | |
| Married | 62% | 124 |
| Not-Married | 38 | 76 |

| | Donate to Charity (n=39) | Indexed To Total (n=732) |
|-------------------------------------|--------------------------------|--------------------------------|
| <u>Ownership of Dwelling</u> | | |
| Own | 76% | 129 |
| Rent | 24 | 62 |
| <u>Education</u> | | |
| High School or less | 12% | 29 |
| Some College or more | 91 | 154 |
| <u>Employment</u> | | |
| Employed | 81% | 123 |
| Unemployed | 19 | 56 |
| <u>Income</u> | | |
| Less than \$40,000 | 13% | 31 |
| \$40,000 or more | 87 | 150 |

* Caution small base size.

Donating Recyclables Appeals To A Small Group Of Young, Successful Males

The small group of recyclers that donate their containers to a drop-off bin are more likely to be younger adults (21-34), employed, and male. Most likely they prefer the quickness and efficiency of the drop-off option.

DROP-OFF BIN RECYCLERS

Base: Among Residents Donating

2005

| | Donate to Drop Off Bin (n=17*) | Indexed To Total (n=732) |
|------------------------------|--------------------------------------|--------------------------------|
| <u>Gender</u> | | |
| Male | 64% | 128 |
| Female | 36 | 72 |
| <u>Age</u> | | |
| 21-34 | 46% | 159 |
| 35-44 | 19 | 86 |
| 45-65 | 31 | 63 |
| <u>Ethnicity</u> | | |
| Caucasian | 56% | 122 |
| Hispanic | 22 | 63 |
| Other | 22 | 116 |
| <u>Marital Status</u> | | |
| Married | 45% | 90 |
| Not-Married | 56 | 112 |

| | Donate to Drop Off Bin (n=17*) | Indexed To Total (n=732) |
|-------------------------------------|--------------------------------------|--------------------------------|
| <u>Ownership of Dwelling</u> | | |
| Own | 88% | 147 |
| Rent | 12 | 30 |
| <u>Education</u> | | |
| High School or less | 6% | 15 |
| Some College or more | 94 | 159 |
| <u>Employment</u> | | |
| Employed | 75% | 114 |
| Unemployed | 25 | 74 |
| <u>Income</u> | | |
| Less than \$40,000 | 20% | 48 |
| \$40,000 or more | 80 | 138 |

* Caution small base size.

Chapter 3: Recycling Motivators And Attitudes

California Recycling Attitude Market Segments

A market segmentation analysis was conducted in 1998 to identify the consumer segments with the greatest recycling potential, and how best to appeal to those segments to encourage recycling. The results revealed that there are four key segments of California residents ranging in size and attitudes toward recycling,.

1998 MARKET SEGMENTATION

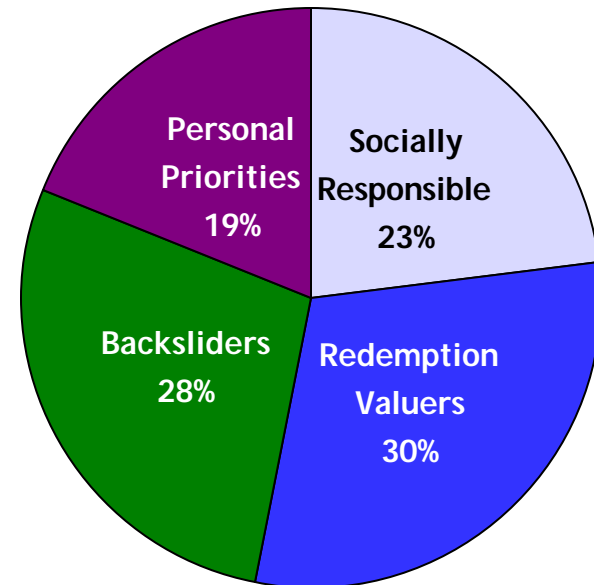
Base: Among Total California Residents in 1998

1998 Segmentation Study

Market Segmentation

- Market segments are developed based on residents' attitudes toward recycling, using a multivariate statistical technique called Cluster Analysis.
- Based on their attitudes toward recycling, residents are grouped into clusters (or market segments).
- This technique identifies clusters of residents whose members have attitudes very similar to one another, and attitudes that are different from those of members of other clusters.

California Residents Cluster Into Four Distinct Groups Which Vary In Their Attitudes Toward Recycling



The Recycling Segments Vary In Their Point Of View Toward Social and Personal Responsibility

Socially Responsible Californians and Redemption Valuers are the most similar attitudinally, in that they have a strong sense of the importance of beverage container recycling and strong values of social responsibility. The Personal Priorities segment members hold their personal needs above those of the community, and Backsliders feel that their efforts for beverage container recycling, and recycling in general, cannot make a difference.

ATTITUDES DRIVING SEGMENTS CLASSIFICATIONS

Base: Among Total California Residents in 1998

1998 Segmentation Study

| | Socially Responsible | Redemption Valuers | Backsliders | Personal Priorities |
|--|---|---|--|---|
| | <i>2 in 10 Californians</i> | <i>3 in 10 Californians</i> | <i>3 in 10 Californians</i> | <i>2 in 10 Californians</i> |
| Environmental Impact | The Socially Responsible and Redemption Valuers believe that "Recycling makes a difference to the environment"; and that "Recycling is important to me as well as to the environment." | | Compared to the other segments, these residents feel more strongly that "Recycling doesn't make a difference to the environment." | This segment is the least likely to feel that "Recycling is important to me as well as the environment." |
| Recycling Empowerment Vs. Recycling Powerless | The Socially Responsible and Redemption Valuers believe that recycling is worth their time and energy, and that everyone is responsible for taking care of the planet. | | Although this segment generally feels that "Individuals can make a difference," they also feel more strongly than any other segment that they can have no impact by recycling beverage containers specifically, and that "Recycling is not worth my time." | These residents generally feel that "Recycling is not worth my time" and that "Recycling beverage containers doesn't matter, I can't make an impact." |
| Responsibility to the Future | The Socially Responsible and the Redemption Valuers feel similarly that recycling is an important commitment to demonstrate to children now, and should be done for future generations. | | Like the Socially Responsible and Redemption Valuers, this powerless segment is also concerned about the environmental impact for the children, but this attitude is overshadowed by their feelings of personal ineffectiveness. | Personal Priorities are the least likely to be concerned with preserving the environment for our children now, or for future generations. |
| Ease and Convenience | Socially Responsible residents hold a moderate view on the ease of recycling in general, as well as the degree to which recycling of beverage containers is easy and convenient. | Redemption Valuers perceive recycling in general, as well as recycling of beverage containers, to be easy and convenient. | Backsliders have the strongest perception that general recycling and recycling of beverage containers is easy and convenient, but this attitude is overshadowed by their feelings of personal ineffectiveness. | Personal Priorities are the least likely to view recycling as easy or convenient. |
| Redemption Value | Like The Personal Priorities segment, redemption value has little relevance, but this is most likely due to their more altruistic motivation for recycling. | Receiving money for beverage container recycling is most important to this segment as an influencer to recycle, yet they view the redemption value as fair, relative to other segments. | This segment, which recycles at a low level, views the redemption value as too low for beverage containers. | The redemption value of recycling has little influence for this segment, as they do not recycle in this fashion. |

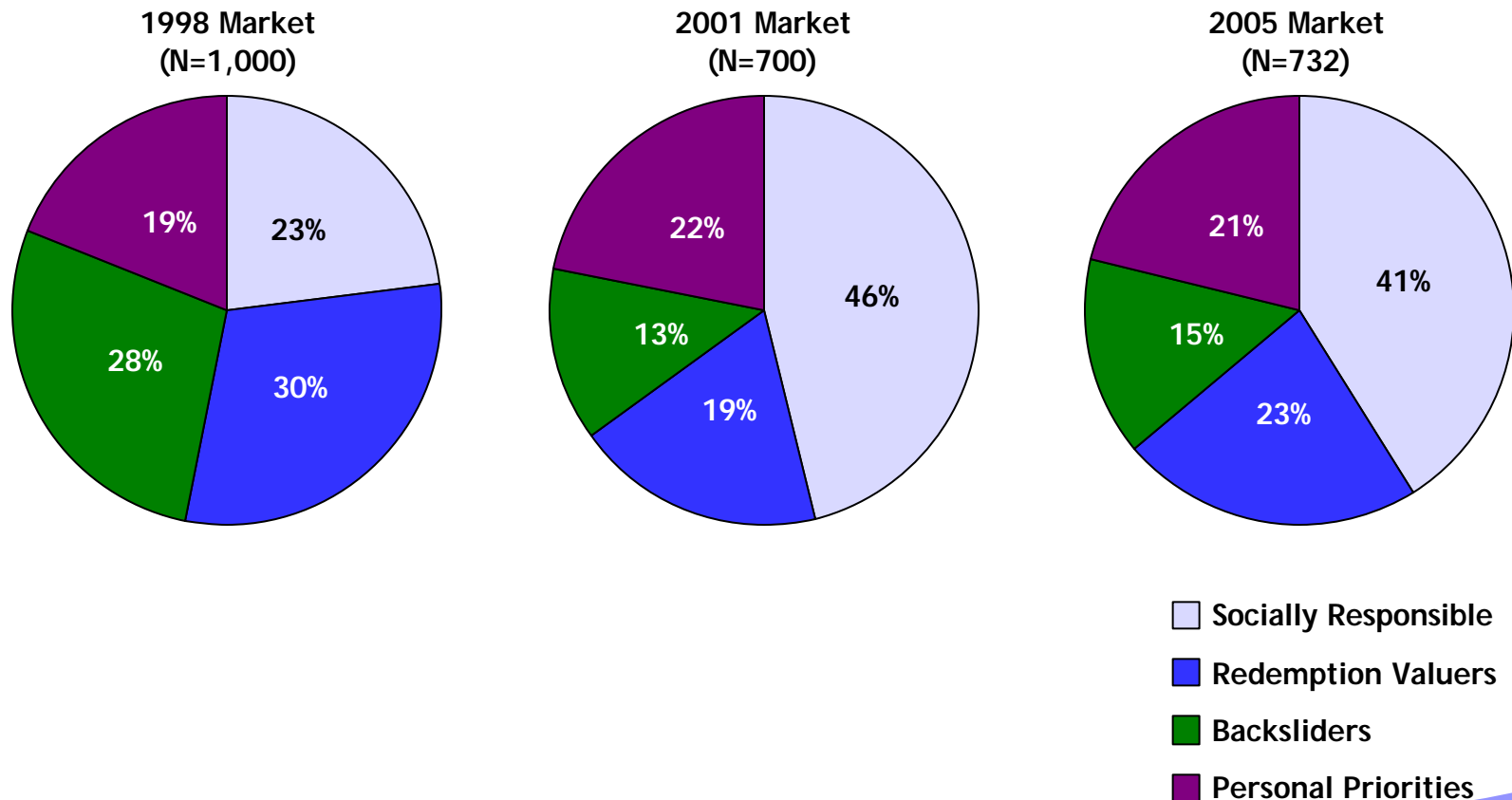
Social Responsibility Continues To Drive Recycling

The largest segment continues to be the Socially Responsible. Redemption Valuers has increased since 2001 with nearly one-quarter of the market falling into this target segment. Messages that focus on social responsibility will continue to resonate with both of these target segments.

SHIFTS IN CONSUMER ATTITUDES TOWARD RECYCLING

Base: Among Total California Residents

Trended



Environmental Concerns Help To Maintain High Recycling Levels

For both English and Spanish speaking residents, “keeping the environment clean” and “saving natural resources” is at the forefront of reasons for recycling.

RECYCLING INFLUENCERS

Base: Among Total California Residents

Top 2 Box On a Ten-Point Scale

Trended

| | Total | | English Speakers | | Spanish Speakers | |
|---|-----------------|-----------------|------------------|-----------------|------------------|-----------------|
| | 2001 (n=700) | 2005 (n=732) | 2001 (n=600) | 2005 (n=631) | 2001 (n=100) | 2005 (n=101) |
| Preventing pollution | 73% | 70% | 70% | 72% | 89% | 61% |
| Keeping the environment clean | 72 | 72 | 71 | 72 | 77 | 74 |
| Saving natural resources | 69 | 71 | 67 | 72 | 61 | 67 |
| Knowing why we should recycle | 55 | 55 | 53 | 54 | 64 | 60 |
| A personal sense of responsibility | 52 | 53 | 51 | 54 | 58 | 49 |
| The location of beverage recycling centers | 30 | 31 | 27 | 27 | 49 | 47 |
| The ease of returning beverage containers | 29 | 31 | 26 | 27 | 42 | 50 |
| Knowing which containers to recycle | 28 | 34 | 26 | 30 | 42 | 56 |
| Space it takes to separate recyclables | 26 | 27 | 22 | 23 | 46 | 45 |
| The 4 cent (\$.04) refund per beverage container | 19 | 24 | 16 | 19 | 35 | 47 |
| Time it takes to separate different containers | 19 | 22 | 17 | 17 | 31 | 46 |
| Effort to rinse out and prepare beverage containers | 18 | 19 | 14 | 16 | 37 | 36 |

Q11: How much influence does [INSERT REASON] have on your decision whether or not to recycle beverage containers? We will use a 1 to 10 scale where a '1' means the reason "does NOT influence your decision to recycle beverage containers AT ALL" and a '10' means the reason "has a VERY STRONG influence on your decision to recycle beverage containers." For each reason I read, please rate it on a 1 to 10 scale. You may use a 1, a 10, or any number in between.

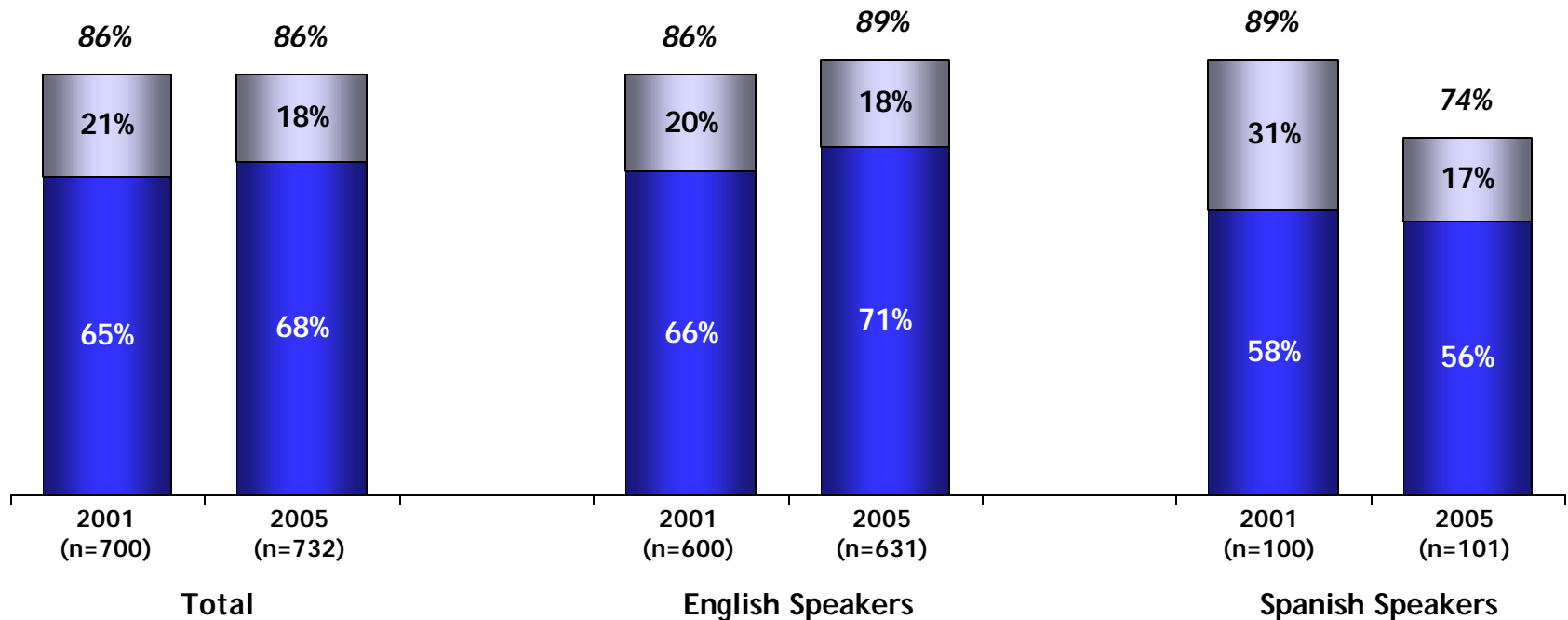
Recycling Behaviors Will Continue Into The Future

Although the majority of California residents expect to maintain their recycling habits, Spanish speaking residents have lower expectations compared to 2001.

FUTURE RECYCLING EXPECTATIONS

Base: Among Total California Residents

Trended



■ Somewhat Likely
■ Very likely

Q26: How likely are you to recycle bottles and cans in the future?

Q27: How likely are you to recycle more bottles and cans in the future?

Spanish Speaking Residents Need More Information On CRV

Only 14% of Spanish speaking residents have heard of CRV and of those that have very few know what it means. CRV awareness is much stronger among English speakers in California with two-thirds having heard of it. All residents are unclear as to what the refund value actually is. The majority of residents do not know that the value is \$.04 or \$.08.

CRV PERCEPTIONS

Base: Among Total California Residents

2005

| | Total (n=732) | English Speakers (n=631) | Spanish Speakers (n=101) |
|------------------------------|------------------|--------------------------------|--------------------------------|
| Aware Of "CRV" | 56% | 65% | 14% |
| Definition Of CRV: | | | |
| California Redemption Value | 25% | 31% | 0% |
| California Refund Value | 9 | 10 | 4 |
| Deposit on bottles and cans | 3 | 4 | 2 |
| Tax on bottles and cans | 3 | 4 | 0 |
| California Recycling Value | 1 | 1 | 0 |
| Cash Refund/Redemption Value | 1 | 1 | 0 |
| Refund Value: | | | |
| None | 1% | 1% | 2% |
| \$.01 to \$.03 | 9 | 9 | 2 |
| \$.04 | 2 | 3 | 0 |
| \$.05 | 36 | 38 | 26 |
| \$.06 to \$.07 | 1 | 1 | 0 |
| \$.08 | 0 | 0 | 0 |
| \$.09 or more | 18 | 14 | 39 |
| Don't know | 33 | 33 | 31 |

Q5a. Have you ever heard of "CRV?"

Q5b. What is CRV?

Q5c. How much do you think is the current refund value you can receive when returning or recycling your bottles and cans?

More Information Is Needed On CRV In All Markets

Although the majority of residents have heard of CRV very few actually know what the refund value is. More information may help to increase the amount of items and frequency of recycling.

CRV PERCEPTIONS BY MARKET

Base: Among Total California Residents

2005

| | Los Angeles (n=131) | Sacramento (n=121) | Bakersfield (n=129) | Chico (n=129) | San Francisco (n=121) |
|------------------------------|------------------------|-----------------------|------------------------|------------------|--------------------------|
| Aware Of "CRV" | 72% | 66% | 61% | 64% | 61% |
| Definition Of CRV | | | | | |
| California Redemption Value | 29% | 24% | 35% | 38% | 28% |
| California Refund Value | 11 | 12 | 11 | 8 | 7 |
| Deposit on bottles and cans | 3 | 4 | 3 | 1 | 5 |
| Tax on bottles and cans | 3 | 4 | 3 | 6 | 3 |
| California Recycling Value | <1 | 3 | 0 | <1 | 0 |
| Cash Refund/Redemption Value | 1 | <1 | 1 | 1 | 1 |
| Refund Value: | | | | | |
| None | 2% | 1% | 1% | 1% | 2% |
| \$.01 to \$.03 | 17 | 5 | 7 | 6 | 12 |
| \$.04 | 1 | 5 | 4 | 1 | 2 |
| \$.05 | 40 | 32 | 36 | 35 | 48 |
| \$.06 to \$.07 | <1 | 0 | 5 | 1 | 0 |
| \$.08 | 1 | 1 | 1 | 0 | 0 |
| \$.09 or more | 9 | 12 | 17 | 17 | 11 |
| Don't know | 30 | 44 | 29 | 39 | 25 |

Q5a. Have you ever heard of "CRV?"

Q5b. What is CRV?

Q5c. How much do you think is the current refund value you can receive when returning or recycling your bottles and cans?

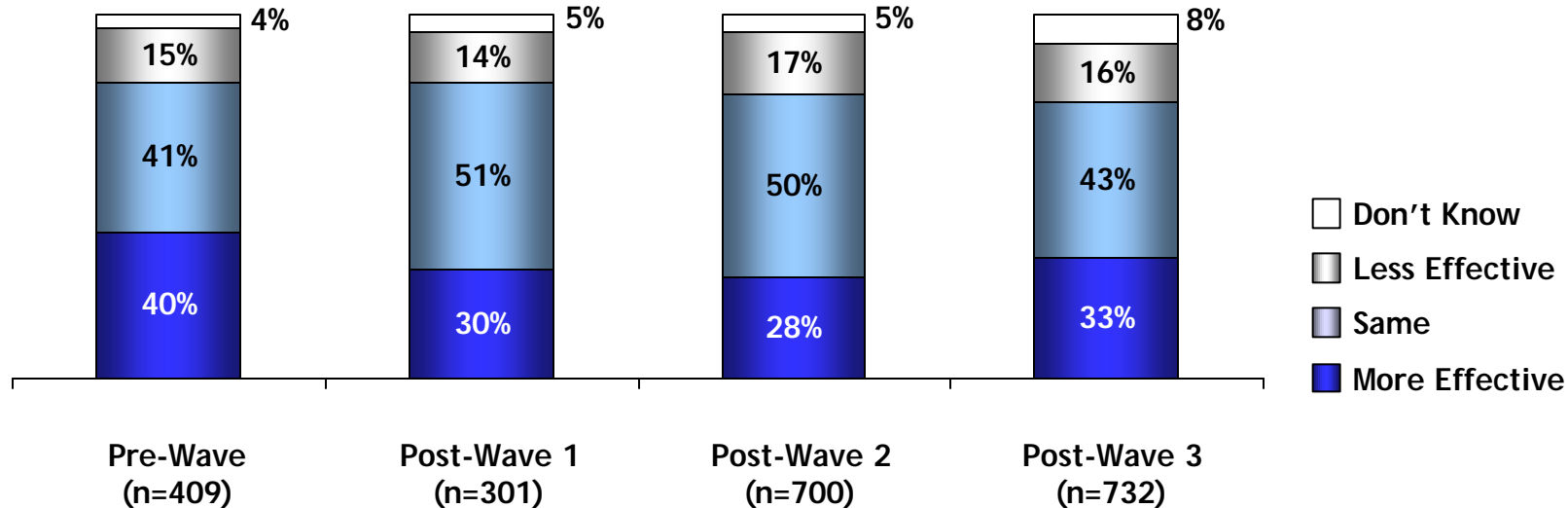
CRV Impacts Californians' Decision To Recycle

The CRV continues to have a positive impact on recycling behavior. Since the Redemption Valuer segment is growing in size, additional focus on promoting information on the CRV may have a positive impact on recycling.

CRV PROGRAM EFFECT TRENDED

Base: Among Total California Residents

Trended



Q7: Would you say it influences you to REDEEM recyclable beverage bottles and cans?

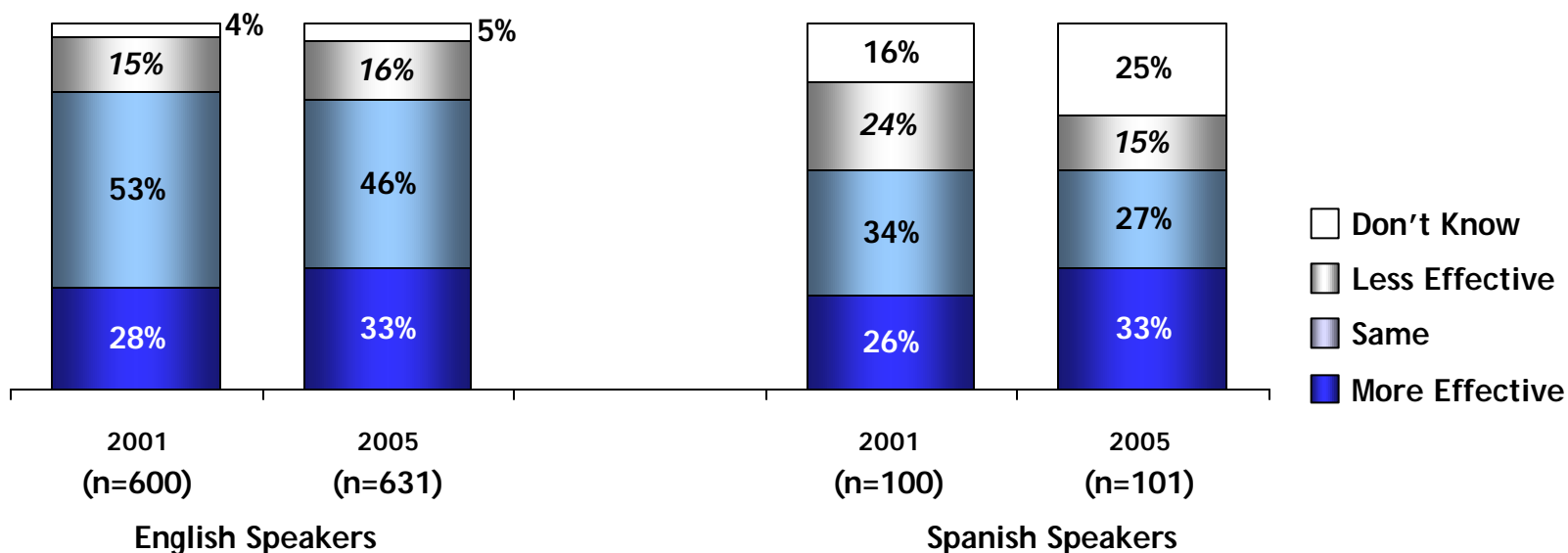
Spanish Speakers Need More Information On CRV

The CRV program has a positive impact on recycling for both English and Spanish speaking residents. Spanish speaking residents, who are not very familiar with CRV, are not as motivated by it due to lack of information.

CRV PROGRAM EFFECT BY LANGUAGE DOMINANCE

Base: Among Total California Residents

Trended



Q7: Would you say it influences you to REDEEM recyclable beverage bottles and cans?

Sacramento, Chico And Bakersfield Residents Are More Influenced By The CRV

Though the majority of California residents would recycle with or without the CRV program, residents of Sacramento, Chico, and Bakersfield are more influenced by this program than those living in Los Angeles or San Francisco.

CRV PROGRAM EFFECT BY REGION

Base: Among Total California Residents

Trended

| | | | More | Same | Less |
|----------------------|-------------|---------|------|------|------|
| <u>Los Angeles</u> | Post-Wave 2 | (n=120) | 29% | 53% | 17% |
| | Post-Wave 3 | (n=131) | 30% | 49% | 21% |
| <u>Sacramento</u> | Post-Wave 2 | (n=120) | 27% | 59% | 10% |
| | Post-Wave 3 | (n=121) | 39% | 51% | 10% |
| <u>Bakersfield</u> | Post-Wave 2 | (n=120) | 41% | 40% | 19% |
| | Post-Wave 3 | (n=129) | 38% | 48% | 14% |
| <u>Chico</u> | Post-Wave 2 | (n=120) | 32% | 45% | 16% |
| | Post-Wave 3 | (n=129) | 39% | 42% | 19% |
| <u>San Francisco</u> | Post-Wave 2 | (n=120) | 16% | 61% | 13% |
| | Post-Wave 3 | (n=121) | 26% | 52% | 22% |

Q7: Would you say it influences you to REDEEM recyclable beverage bottles and cans?

Most Residents Are Happy With Their Recycling Behavior

Very few residents have any suggestions for what would influence the increase in their recycling behaviors. Of those that have suggestions, convenience is at the top of the list - curbside pick-up and more recycling bins.

SUGGESTIONS TO INCREASE RECYCLING

Base: Among Total California Residents

Trended

| | Total | | English Speakers | | Spanish Speakers | |
|---|-----------------|-----------------|------------------|-----------------|------------------|-----------------|
| | 2001 (n=700) | 2005 (n=732) | 2001 (n=600) | 2005 (n=631) | 2001 (n=100) | 2005 (n=101) |
| <u>Ease of Use (Net)</u> | 12% | 12% | 13% | 14% | 7% | 3% |
| Provide curbside pickup | 7 | 6 | 8 | 7 | 0 | 0 |
| Pick up frequently | 2 | 1 | 2 | 2 | 2 | 0 |
| Let us recycle more items | 0 | 1 | 2 | 1 | 2 | 0 |
| <u>Economics (Net)</u> | 10 | 9 | 10 | 10 | 14 | 8 |
| Offer higher redemption amount | 7 | 6 | 7 | 6 | 10 | 5 |
| <u>Collection Containers (Net)</u> | 8 | 10 | 6 | 10 | 16 | 6 |
| Bins | 3 | 7 | 3 | 8 | 2 | 4 |
| <u>Information (Net)</u> | 4 | 6 | 4 | 5 | 6 | 8 |
| <u>Facilities (Net)</u> | 3 | 3 | 2 | 3 | 6 | 5 |
| <u>Not Applicable (Net)</u> | 58 | 48 | 64 | 49 | 35 | 44 |
| Doing all we can | 10 | 13 | 11 | 15 | 9 | 7 |
| Nothing/Fine as is | 30 | 21 | 34 | 22 | 12 | 15 |
| Don't Know | 18 | 12 | 19 | 11 | 14 | 19 |

Q8: What, if anything, could be done to make your household recycle more beverage bottles and cans?

The Three Major Containers Top The List For CRV Awareness

Most California residents are aware that aluminum cans, plastic bottles and glass bottles all qualify for the CRV program. However, awareness levels are continuing to decline for all three types of packaging. Revisiting the qualifying materials would be helpful for residents.

CRV PROGRAM AWARENESS TRENDED

Base: Among Total California Residents

Trended

| | Pre-Wave (N=409) | Post-Wave 1 (N=301) | Post-Wave 2 (N=700) | Post-Wave 3 (n=732) |
|--|---------------------|------------------------|------------------------|------------------------|
| Aluminum cans (non-specific) | 61% | 75% | 70% | 66% |
| Plastic bottles (non-specific) | 50 | 53 | 58 | 43 |
| Glass bottles (non-specific) | 37 | 58 | 51 | 39 |
| Carbonated soft drinks | 29 | 16 | 10 | 15 |
| Beer and malt beverages | 23 | 11 | 12 | 13 |
| 100% fruit juices | 8 | 4 | 6 | 7 |
| Milk | 7 | 7 | 9 | 5 |
| Carbonated mineral and soda water | 5 | 3 | 6 | 6 |
| Sport drinks | 4 | 3 | 4 | 3 |
| Non-carbonated water | 3 | 2 | 2 | 4 |
| Carbonated and non-carbonated fruit drinks | 2 | 1 | 2 | 4 |
| Coffee and tea drinks | 2 | 1 | 1 | 1 |
| Wine | 2 | 1 | 2 | 2 |
| Diet/health drinks | 1 | 2 | 1 | 3 |
| Distilled spirits | <1 | 2 | 1 | 1 |
| Infant formula | <1 | <1 | <1 | 1 |
| Vegetable juices | 1 | 1 | 2 | 1 |
| Wine coolers and distilled spirit coolers | 1 | 1 | 2 | <1 |
| Medical food | 0 | 0 | 1 | 1 |
| Other (Specify) | 2 | 0 | 2 | 1 |

Q6: As far as you know, what beverage containers are included in the "California Redemption Value" Program?

Spanish Speaking Residents Need More Information On The CRV Program

Spanish speaking residents are aware that aluminum cans can be recycled in the CRV program, but very few are aware that other containers are part of the program. In-language materials will help increase the awareness among this audience and increase overall recycling behavior.

CRV PROGRAM AWARENESS

Base: Among Total California Residents

Trended

| | Total | | English Speakers | | Spanish Speakers | |
|--|-----------------|-----------------|------------------|-----------------|------------------|-----------------|
| | 2001 (n=700) | 2005 (n=732) | 2001 (n=600) | 2005 (n=631) | 2001 (n=100) | 2005 (n=101) |
| Aluminum cans (non-specific) | 70% | 66% | 72% | 68% | 64% | 55% |
| Plastic bottles (non-specific) | 58 | 43 | 59 | 46 | 52 | 27 |
| Glass bottles (non-specific) | 51 | 39 | 51 | 44 | 55 | 16 |
| Beer and malt beverages | 12 | 15 | 12 | 17 | 10 | 7 |
| Carbonated soft drinks | 10 | 13 | 10 | 14 | 6 | 9 |
| Milk | 9 | 7 | 9 | 6 | 9 | 12 |
| 100% fruit juices | 6 | 5 | 5 | 6 | 10 | 1 |
| Carbonated mineral and soda water | 6 | 6 | 6 | 7 | 8 | 0 |
| Sport drinks | 4 | 3 | 5 | 3 | 2 | 3 |
| Carbonated and non-carbonated fruit drinks | 2 | 4 | 2 | 5 | 3 | 0 |
| Non-carbonated water | 2 | 4 | 3 | 5 | 1 | 1 |
| Vegetable juices | 2 | 1 | 2 | 1 | 0 | <1 |
| Wine | 2 | 2 | 2 | 3 | 0 | 0 |
| Wine coolers and distilled spirit coolers | 2 | 3 | 2 | 3 | 0 | 5 |
| Diet/health drinks | 1 | 1 | 1 | 1 | 0 | 2 |
| Distilled spirits | 1 | 1 | 1 | <1 | 0 | 2 |
| Infant formula | <1 | 1 | <1 | <1 | 0 | 2 |
| Medical food | <1 | <1 | <1 | 1 | 0 | 0 |
| Coffee and tea drinks | 1 | 1 | 1 | 2 | 0 | 1 |

Q6: What other beverage containers do you think are included in the "California redemption value" program?

The Internet Plays An Even More Important Role In Recycling Information Searches

Internet searches has nearly doubled in use among California residents when searching for recycling information. Second to the Internet, residents turn to recycling centers and waste management centers, however to a lesser degree than in 2001.

INFORMATION SOURCES USED

Base: Among Total California Residents

Trended

| | 2001 (n=700) | 2005 (n=732) |
|---------------------------------|-----------------|-----------------|
| <u>Refuse related (Net)</u> | 31% | 24% |
| Recycling/Center | 18 | 14 |
| Waste Management Service | 6 | 5 |
| Sanitation/Collector | 4 | 5 |
| Scrap/Yard | 2 | 0 |
| <u>Government Service (Net)</u> | 17 | 12 |
| Local Government | 13 | 10 |
| City Government | 5 | 1 |
| The City | 4 | 5 |
| Other Government Services | 3 | 1 |
| Agency (ns) | 2 | 1 |
| <u>Internet (Net)</u> | 16 | 30 |
| Internet | 14 | 26 |
| Website/Specific websites | 2 | 3 |

| | 2001 (n=700) | 2005 (n=732) |
|--------------------------------|-----------------|-----------------|
| <u>Media (Net)</u> | 12% | 10% |
| Phone Book/Yellow Pages | 8 | 7 |
| Newspaper | 2 | 2 |
| <u>Point of Purchase (Net)</u> | 3 | 2 |
| Retail store | 2 | 2 |
| Other Mentions | 6 | 10 |
| Friends/Relatives | 2 | 3 |
| None | 2 | 3 |
| Don't know | 25 | 17 |

Q9: If you wanted to find more information about recycling beverage bottles and cans, where would you go or who would you contact to find that information?

1-800-RECYCLE Has The Strongest Awareness Levels

Almost half of all California residents are aware that they can access information through 1-800-RECYCLE, however knowledge of this resource among Spanish speakers has dropped significantly in the last 4 years. There is also a lack of overall awareness among all residents on the existence of recycling-related official websites. Almost a quarter of all residents are aware of the government's involvement in recycling programs.

AWARENESS OF INFORMATION SOURCES

Base: Among Total California Residents

Trended

| | Total | | English Speakers | | Spanish Speakers | |
|-----------------------------|-----------------|-----------------|------------------|-----------------|------------------|-----------------|
| | 2001 (n=700) | 2005 (n=732) | 2001 (n=600) | 2005 (n=631) | 2001 (n=100) | 2005 (n=101) |
| 1-800-RECYCLE | 50% | 47% | 48% | 50% | 57% | 31% |
| www.bottlesandcans.com | 6 | 7 | 5 | 8 | 10 | 6 |
| www.cansandbottles.com | 3 | 5 | 2 | 4 | 4 | 8 |
| Government Agency Awareness | | | | | | |
| Yes | 24% | 25% | 24% | 26% | 29% | 18% |
| No | 75 | 75 | 75 | 74 | 71 | 82 |
| Government Services | | | | | | |
| Local government (Subnet) | 4% | 4% | 4% | 4% | 2% | 2% |
| Agency (Subnet) | 3 | 3 | 3 | 3 | 2 | 2 |

Q10a: Have you heard of the following information sources?

Q10b: Before today, were you aware that there is a government agency that administers the beverage container recycling program?

Q10c: What government agency administers the beverage container recycling program?

California Residents Want More Information

California residents have a good understanding of the benefits of recycling to the environment and that each person has a responsibility to recycle. Now informational messaging around making the process easier will have a positive impact. Areas to focus on are items that can be recycled and the overall CRV program.

PROGRAM ENHANCEMENTS

Base: Residents Aware of Government Agency

Trended

| | Total | | Those Who Recycle | |
|--|-----------------|-----------------|-------------------|-----------------|
| | 2001 (n=164) | 2005 (n=193) | 2001 (n=138) | 2005 (n=170) |
| Economics (Net) | 16% | 11% | 15% | 12% |
| Offer higher redemption amounts | 7 | 3 | 6 | 3 |
| Information (Net) | 14 | 20 | 12 | 21 |
| Make people more aware | 6 | 8 | 6 | 8 |
| More publicity | 6 | 3 | 6 | 3 |
| Media | 3 | 2 | 3 | 2 |
| Ease of Use (Net) | 14 | 11 | 12 | 11 |
| Provide curbside pickup | 4 | 2 | 4 | 2 |
| Let us recycle more items/less restrictions | 4 | 1 | 4 | 1 |
| Make it easier/more convenient | 3 | 7 | 3 | 7 |
| Collection Containers (Net) | 9 | 7 | 9 | 7 |
| Provide more bins | 2 | 1 | 2 | 2 |
| Facilities (Net) | 7 | 5 | 7 | 5 |
| More recycling centers | 4 | 3 | 3 | 3 |
| Other (Net) | 6 | 5 | 6 | 6 |
| Provide containers | 2 | 1 | 3 | 2 |
| Provide containers for individual apartments | 2 | 0 | 1 | 0 |
| Not Applicable (Net) | 5 | 38 | 4 | 35 |
| I wouldn't recycle anyway | 2 | 0 | 2 | 0 |
| None | 12 | 15 | 14 | 17 |
| Don't know | 31 | 22 | 32 | 17 |

Q10d: If you administered the program, what changes would you make? What other changes would you make?

The Single Most Important Need For Spanish Speaking Residents Is Information

The Spanish speaking community is not as engaged in recycling information as in 2001. There is a strong need for re-educating this segment to increase their overall awareness and use of recycling methods.

PROGRAM ENHANCEMENTS BY LANGUAGE DOMINANCE

Base: Residents Aware of Government Agency

Trended

| | Total | | English Speakers | | Spanish Speakers | |
|--|-----------------|-----------------|------------------|-----------------|------------------|-----------------|
| | 2001 (n=164) | 2005 (n=193) | 2001 (n=136) | 2005 (n=174) | 2001 (n=28*) | 2005 (n=19*) |
| <u>Economics (Net)</u> | 16% | 11% | 17% | 13% | 13% | 0% |
| Offer higher redemption amounts | 7 | 3 | 8 | 3 | 4 | 0 |
| <u>Information (Net)</u> | 14 | 20 | 9 | 18 | 36 | 33 |
| Make people more aware | 6 | 8 | 4 | 9 | 16 | 4 |
| More publicity | 6 | 3 | 4 | 3 | 14 | 5 |
| Media | 3 | 2 | 1 | 2 | 11 | 0 |
| <u>Ease of Use (Net)</u> | 14 | 11 | 15 | 13 | 6 | 0 |
| Provide curbside pickup | 4 | 2 | 5 | 2 | 0 | 0 |
| Let us recycle more items/less restrictions | 4 | 1 | 4 | 1 | 0 | 0 |
| Make it easier/more convenient | 3 | 7 | 4 | 8 | 0 | 0 |
| <u>Collection Containers (Net)</u> | 9 | 7 | 8 | 8 | 14 | 0 |
| Provide more bins | 2 | 1 | 2 | 2 | 0 | 0 |
| <u>Facilities (Net)</u> | 7 | 5 | 6 | 5 | 10 | 5 |
| More recycling centers | 4 | 3 | 2 | 3 | 10 | 5 |
| <u>Other (Net)</u> | 6 | 5 | 4 | 6 | 14 | 0 |
| Provide containers | 2 | 1 | <1 | 1 | 10 | 0 |
| Provide containers for individual apartments | 2 | 0 | 2 | 0 | 0 | 0 |
| <u>Not Applicable (Net)</u> | 5 | 38 | 5 | 35 | 5 | 57 |
| I wouldn't recycle anyway | 2 | 0 | 2 | 0 | 0 | 0 |
| None | 12 | 15 | 14 | 14 | 0 | 21 |
| Don't know | 31 | 22 | 31 | 20 | 32 | 36 |

Q10d: If you administered the program, what changes would you make? What other changes would you make?

* Caution small base size.

Market Needs Vary

More information on recycling is needed in Chico and Sacramento, while Los Angeles and Bakersfield residents want more money back through a higher redemption value. San Francisco residents, where nearly all are already recycling have very few suggestions for change.

PROGRAM ENHANCEMENTS BY MARKET

Base: Residents Aware of Government Agency

2005

| | Los Angeles (n=38) | Sacramento (n=43) | Bakersfield (n=27*) | Chico (n=34) | San Francisco (n=32) |
|---|-----------------------|----------------------|------------------------|-----------------|-------------------------|
| <u>Economics (Net)</u> | 19% | 16% | 19% | 8% | 4% |
| Offer higher redemption amounts | 1 | 4 | 6 | 4 | 2 |
| <u>Information (Net)</u> | 12 | 22 | 13 | 33 | 13 |
| Make people more aware | 3 | 14 | 11 | 18 | 1 |
| More publicity | 0 | 4 | 0 | 4 | 5 |
| Media | 3 | 0 | 0 | 3 | 4 |
| <u>Ease of Use (Net)</u> | 9 | 17 | 17 | 18 | 4 |
| Provide curbside pickup | 2 | 6 | 2 | 0 | 1 |
| Let us recycle more items/less restrictions | 0 | 3 | 2 | 2 | 0 |
| Make it easier/more convenient | 7 | 4 | 14 | 14 | 4 |
| <u>Collection Containers (Net)</u> | 7 | 5 | 13 | 3 | 11 |
| Provide more bins | 6 | 1 | 0 | 0 | 0 |
| <u>Facilities (Net)</u> | 9 | 5 | 8 | 2 | 0 |
| More recycling centers | 2 | 3 | 8 | 2 | 0 |
| <u>Other (Net)</u> | 2 | 0 | 5 | 0 | 2 |
| Provide containers | 2 | 0 | 2 | 0 | 2 |
| <u>Not Applicable (Net)</u> | 35 | 26 | 25 | 31 | 57 |
| None | 16 | 14 | 8 | 4 | 23 |
| Don't know | 19 | 11 | 16 | 24 | 33 |

Q10d: If you administered the program, what changes would you make? What other changes would you make?

* Caution small base size.